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ABSTRACT

A national strategy to provide literacy education for all older Canadians who need it is described in this document. Developed in response to a 1989 survey finding that 64 percent of Canadians aged 55-69 experience some degree of trouble with everyday reading material, the strategy includes a rationale, objectives, and a 3-year start-up plan to develop the commitment, the tools, and the impetus to work toward the achievement of the goal of "a society where low literacy is not a barrier to full participation of seniors." The five chapters are as follows: (1) an introduction to the problems; (2) background information on literacy and seniors; (3) a rationale, guiding principles, and methods; (4) a 3-year start-up plan; and (5) and a conclusion calling for One Voice to take the lead in promoting literacy for older Canadians. Five appendixes list task force members, provide draft terms of reference for the proposed coalition and the secretariat, outline the elements of an awareness plan, list task force recommendations, and list publications on older adult literacy. (KC)

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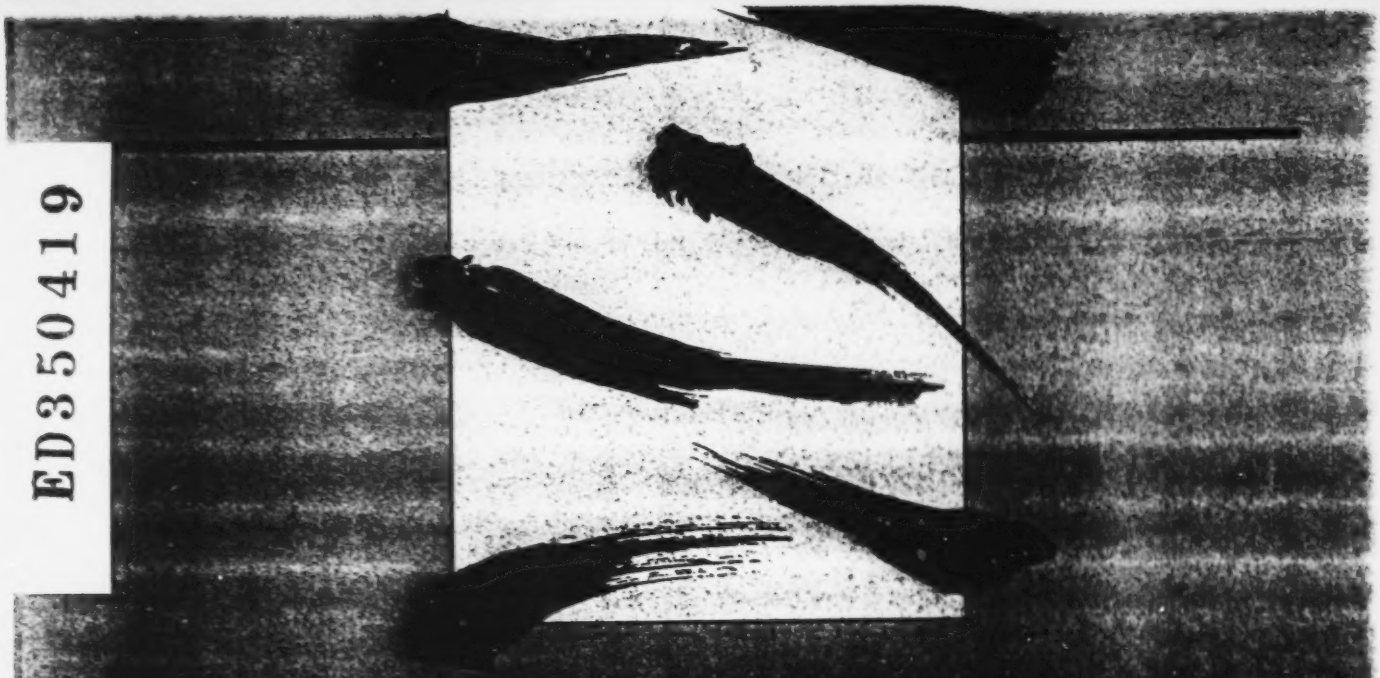

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The Canadian Seniors Network

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# A National Literacy Strategy for Older Canadians

*"Learning is the only viable response to change."*

*One Voice*

*The Canadian Seniors Network*

*A National Literacy Strategy for Older Canadians*

**One Voice**, the Canadian Seniors Network

Ottawa, Canada, 1991

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***One Voice Mission Statement***

**One Voice**, the Canadian Seniors Network, promotes the enhancement of the status and independence of older Canadians. **One Voice** advocates policies and programs to improve the well-being of Canadian seniors and encourages and enables their full and active participation in decisions affecting their lives. **One Voice** is a non-partisan, voluntary, not-for-profit organization providing leadership and working in partnership and consultation with others.

Adopted by the Board of Directors of
**One Voice**
13 October 1989

# Table of Contents


Acknowledgements ..... 2

Foreword ..... 3

Executive Summary ..... 4

1 Introduction ..... 6

2 Background ..... 8
- What is literacy? ..... 8
- Measuring literacy ..... 8
- Historical perspectives ..... 11
- Other factors ..... 12
- How literacy affects older adults today ..... 12
- Seniors and literacy programs ..... 14
- Alternative forms of literacy ..... 14
- Trends to the future ..... 15
- The choice ..... 16

3 A Rationale: Literacy for Canada and older Canadians ... 17
- Guiding principles ..... 17
- The Cedar Glen Declaration ..... 19
- Defining a goal ..... 19
- Methods ..... 20
- Moving to action ..... 20

4 A Three-year Start-up Plan ..... 21
- 1. Overview ..... 21
- 2. The Canadian Coalition for Older Adult Literacy ..... 23
- 3. Partners ..... 24
- 4. Activities ..... 27
  - Year 1 ..... 27
  - Year 2 ..... 32
  - Year 3 ..... 35
- 5. Concluding remarks ..... 38

5 Conclusion ..... 39

Appendices

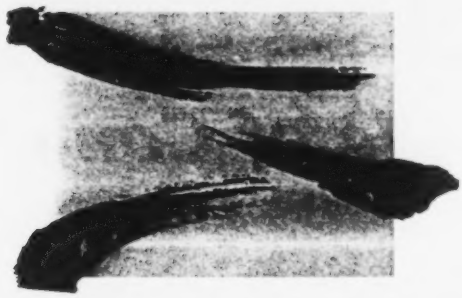
A Medicine Hat Task Force members ..... 41

B Draft Terms of Reference for the Coalition and the Secretariat ..... 44

C Outline of elements for an Awareness Plan ..... 45

D Task Force issues report and recommendations ..... 47

E **One Voice** publications on older adult literacy ..... 53



# Acknowledgements

**One Voice** expresses its appreciation to the many individuals and organizations who have contributed to the development of this *National Literacy Strategy for Older Canadians.*

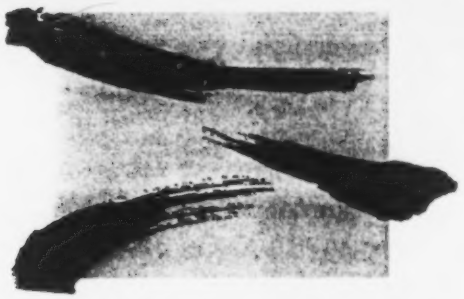
From our first work in the field — a literature review (conducted by Jane Rutherford) and field research (Rhea Shulman) — to our 'think tank' Medicine Hat Task Force (whose members are listed in the Appendix), **One Voice** has benefited from the time and talents of specialists in a wide range of subject areas. Researchers, literacy trainers, statisticians, policy analysts, seniors, professionals working with seniors, educators and many more have given their best advice on understanding the problem of low literacy among older adults and how to fix it.

The project was funded by the National Literacy Secretariat of the Department of the Secretary of State of Canada, with contributions from the Government of Ontario's Ministry of Education and Office for Senior Citizens' Affairs. **One Voice** was able to provide its contribution through the generosity of the Samuel and Saidye Bronfman Family Foundation.

The Strategy was written by Andrew Aitkens, Director of Research and Communications of **One Voice**. Special advice and ideas came from Professor Stan Jones of Carleton University; Dick Weiler, a policy specialist working with the National Literacy Secretariat; Sylvie Deliencourt, **One Voice**'s literacy Project Officer; and Ivan Hale, National Secretary of **One Voice**. A small but passionate sub-group of the Medicine Hat Task Force provided a focus on the Strategy as it will apply to francophones.

Our confidence in the Strategy's potential to have a real impact on low literacy among seniors comes from the fact that most of the organizations who can do something to help were involved right from the start in developing the plan. Their participation and contribution have ensured that the Strategy is realistic and 'do-able', and we are certain that the spirit of cooperation and collaboration that we saw at every meeting will lead to commitment and action as the Strategy is implemented.

As this document was prepared, advanced copies were circulated to organizations involved in the development or implementation of the Strategy. Enthusiastic endorsements came from Task Force members and the many provincial seniors organizations making up the **One Voice** network, as well as the international offices of Unesco and the Canadian Commission for Unesco, the Canadian Organization for Development through Education, The Royal Canadian Legion, Federal Superannuates National Association, Elderhostel Canada, Frontier College, the Centre for the Study of Adult Literacy, Laubach Literacy of Canada, and many members of the literacy community. Letters of support continued to arrive even as we went to press.



# Foreword

In today's complex information age, Canadians who can't read are at a serious disadvantage; and those who are aging may actually be at risk in our communities. Taking medication, responding to an emergency, managing a tight budget — these all require a degree of skill in reading and calculating. Yet the figures from Statistics Canada's *Survey of Literacy Skills Used in Daily Activities* show that a shocking 64% of Canadians aged 55-69 experience some degree of trouble with everyday reading demands.

Low literacy prevents seniors from taking an active role in the social and political life of their community and their country. In fact, without the ability to read or write, seniors are prevented from taking full control of their own lives. They face isolation and loss of independence. As a society, these are outcomes we neither want nor can afford.

As a national organization and network of seniors groups across Canada, **One Voice** is dedicated to promoting the active and direct participation of older Canadians in matters and decisions which affect them. We view literacy as a tool which can empower seniors and give them a voice; without it, they stand to lose opportunities, both as individuals and as a force in our society.

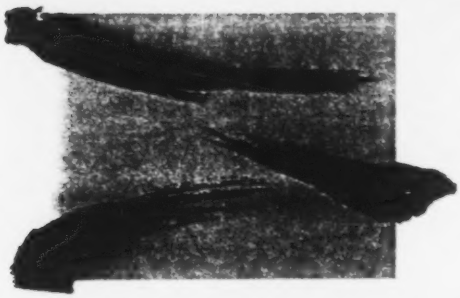
This *National Literacy Strategy for Older Canadians* is built upon the Unesco philosophy that everyone, regardless of age, has the right to a basic education. That includes literacy. The Strategy is also a model of partnership and collaboration.

Seniors have much to give our society. As **One Voice** developed this Strategy for action, it became clear that seniors are anxious to become a major part of the solution. Many older people are already volunteers in literacy tutoring programs, and many more could get involved. They are more than willing to share their experience and wisdom with all generations of Canadians.

I am convinced that improving literacy for seniors will open a doorway through which the light of Canada's heritage can shine.

Jean R. Woodsworth

Jean Woodsworth
President



# Executive Summary

Statistics Canada's *Survey of Literacy Skills Used in Daily Activities*, conducted in 1989, revealed that a shocking 64% of Canadians aged 55-69 experience some degree of trouble with everyday reading material. This is largely because historical events, such as the Depression and the War, interrupted normal schooling, which in itself was not as highly valued or needed as it is today. Language and literacy training were not widely available for immigrants at that time. A whole generation of Canadians missed the opportunity to acquire or improve these important skills.

**One Voice**, the Canadian Seniors Network, believes that literacy skills — reading, writing and calculating — are central to the full and active participation of older Canadians in our society. Without these skills, individuals lose the rights and responsibilities of their role in society. For the group aged 55-69, who are now entering or approaching their retirement years, the problems that can come with aging — ill health, disability, declining income, etc. — will be all the more hazardous without the ability to read and understand medication labels, manage a tight budget, arrange for support services, cope with emergencies, etc. Simply put, older Canadians need to be literate to minimize risk in their daily lives and maintain their independence.

Research has shown that older people may lose literacy skills over time if they are not used; however, skills can be maintained with regular practice, they can be upgraded, and new skills can be learned. **The ability to learn does not decline with age.**

We have also learned that almost no seniors are taking literacy courses. Reasons for this include their embarrassment about being illiterate, lack of literacy programs suited to seniors' interests or learning styles, and a sense that literacy skills are not necessary.

Over two million older Canadians are illiterate. The extreme seriousness of the problem calls for a major, sustained initiative, coordinated nationally. In this document, **One Voice** presents a rationale for improving seniors' literacy based on five guiding principles.

1. Being or becoming literate is a basic human rights entitlement throughout the lifespan of all Canadians, and is often a determining factor in gaining access to benefits to which an individual is entitled.
2. Literacy is a basic skill for effective participation in Canada's democratic society.

3 No Canadian should be discriminated against on the basis of literacy level. For those with low literacy skills, supports should be available to compensate.

4 Canadians have a collective responsibility to recognize and respect the linguistic and cultural diversity of our nation in our approach to literacy issues and programs.

5 Literacy levels within our population have important economic costs and benefits both to individuals and to Canadian society as a whole. Literacy is central to the maintenance of Canada's society, economy and culture.

In moving to action, the document establishes a goal to aim for and two ways of achieving it.

**Goal:** a society where low literacy is not a barrier to full participation of seniors.

**Objective:** to raise literacy levels among older Canadians, primarily by increasing literacy training among seniors.

**Objective:** to create a supportive system in our communities to sustain seniors who, for whatever reason, are not literate.

To accomplish these tasks, **One Voice** has recommended the formation of a **Canadian Coalition for Older Adult Literacy**. This body will be composed of some thirty individuals representing the key players or 'stakeholders' in the issue. The partners include seniors, the literacy community, learners, researchers, the education sector, governments (federal, provincial and municipal), labour and special interest groups, the corporate sector, professionals, the media, the publishing and book trade, communities, and the retail and service sectors. Core funding for the Coalition and its secretariat will be sought from the National Literacy Secretariat and other appropriate sources.

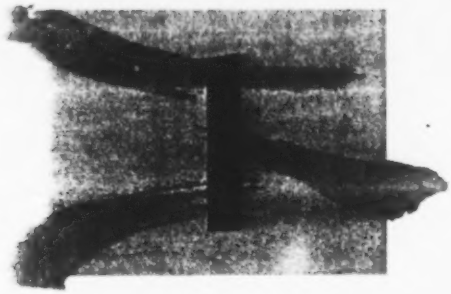
The Coalition will guide the implementation of the Strategy through a Three-year Start-up Plan, which follows a process of organization, set-up and implementation.

During the first year, the Coalition is established and work begins immediately on the development of programming. Year 2, the set-up year, is devoted to increasing program development and designing the appropriate delivery mechanisms, as well as planning a promotion scheme; then, in the third year, the Plan moves into the main thrust of the awareness campaign to promote uptake of the programs.

The reasoning for this approach stems from the research which tells us that existing literacy programming is, to a large extent, both inadequate and unsuitable for seniors, and that training for support providers is equally lacking. Special attention is needed for some populations, such as francophones and ethnic groups. To cope with this reality, it is necessary to create a reasonable "supply" of programs over the first two years before creating the "demand" in Year 3.

Evaluation will be on-going throughout the three years, to assess the impact of the Plan and also the effectiveness of the Coalition as a coordinating body. In addition, the Plan calls for preparation for the long term — planning further action and developing an ongoing funding strategy.

It is extremely unlikely that at the end of three years the Coalition will have reached the objectives of the Strategy; it would be realistic to allow a ten or twenty year time frame to attain the desired results. Nevertheless, the Three-year Start-up Plan will provide an underlying commitment, the tools and the impetus to carry forward for many years towards the achievement of our goal: a society where the barriers of low literacy are overcome to permit all Canadians to grow older enjoying full participation, greater personal fulfillment, economic independence, safety and security, and a high quality of life.



# Introduction

In preparation for International Literacy Year, 1990, Statistics Canada conducted a *Survey of Literacy Skills Used in Daily Activities* for the National Literacy Secretariat, Department of the Secretary of State of Canada. The data revealed that a shocking 64% of Canadians aged 55-69 experience some degree of trouble with everyday reading material (see Chart 1 for details). This is in direct contrast to the total population, for whom the corresponding figure is 37%.

While the survey failed to measure those over seventy years of age, it is believed that their literacy skills are as poor.

**One Voice**, the Canadian Seniors Network, believes that literacy skills — reading, writing and calculating — are central to the full and active participation of older Canadians in our society. Without these skills, individuals lose the rights and responsibilities of their role in society. For the group aged 55-69, who are now entering or approaching their retirement years, the problems that can come with aging — ill health, disability, declining income, etc. — will be all the more hazardous without the ability to read and understand medication labels, manage a tight budget, arrange for support services, cope with emergencies, etc. Simply put, older Canadians need to be literate to maintain their independence.

The economic costs alone of having an illiterate older population is sufficient cause for action.

In April, 1990, **One Voice** held a national conference entitled ***Learning — That's Life!*** in Ottawa to bring together representatives of the literacy community and seniors. Over the course of three days, delegates learned of the dimensions and implications of illiteracy among older Canadians and concluded that there was an urgent need for a *National Literacy Strategy for Older Canadians.* They examined some innovative programs currently in operation, and developed a series of recommendations for a strategy. The Conference Report, a companion piece to this document, offers a comprehensive discussion of the issue and summarizes the findings and recommendations.

As the next major step in its literacy initiative, **One Voice** convened a Task Force to develop a framework for its national strategy. Members of the Task Force represented key players in the problem and the solution: the literacy community, researchers, education specialists, seniors groups, francophones, native peoples, policy analysts and governments. Meeting in Medicine Hat, Alberta, 6-9 September 1990, the Task Force brought their personal and professional perspectives to the table and engaged in a lively and creative exchange.

The Task Force concluded that the surprisingly low level of literacy in Canadian society, particularly among older citizens, is a major social issue that demands our immediate attention.

In this report **One Voice** has recorded the essence of these discussions and presented the resulting Strategy and action plan, which we believe can and must be embraced and acted upon by all Canadians, for the benefit of all Canadians.

# Background

### *What is literacy?*

The Unesco definition of functional literacy states that, to be functionally literate, people must be able to engage in all those activities in which literacy is required for effective functioning of their group and community. They should have the ability to use reading, writing and calculation for their own and the community's development.

Designed to apply to virtually all societies in the world, this definition needs some interpretation to understand its implications for literacy in Canadian terms.

Canada in the 1990s is an advanced society of the western world. Within the context of a rapidly evolving global village, our workforce, communities, educational system and communications networks must keep pace with those of other nations. The ability to read, write and calculate at a high level are so central to functioning in the Canada of today that they are virtually taken for granted. Opportunities to succeed, the capacity to contribute to society, and personal well-being all hinge on literacy skills. Our communities are complex and many-layered service systems; business is conducted instantaneously from sea to sea with the aid of sophisticated electronic equipment; the television schedule takes half a page of the newspaper; health care is a mega-million dollar, high-tech industry. And there is every indication that the speed with which society is developing will increase.

Seen in this context, literacy in Canada is an essential tool of survival, not a luxury.

### *Measuring literacy*

Measuring literacy levels has always been problematic. The level of schooling achieved has been used as an indicator; but education systems vary widely, and skills may be lost over time. Functional definitions, however, relating directly to the tasks encountered in everyday living, provide a more accurate assessment of ability.

It was this approach that guided the design of the national *Survey of Literacy Skills Used in Daily Activities* conducted by Statistics Canada in October 1989, on behalf of the National Literacy Secretariat. Interviews were administered to some 9,500 individuals in their homes and involved a series of tasks designed to test reading, writing and numeracy activities commonly encountered in daily life in Canada.

For the purposes of the survey, literacy was defined as "the information processing skills necessary to use the printed material commonly encountered at work, at home and in the community". For reading, the abilities ranged from locating a word or item in a document (for example, locating the expiry date on a driver's licence) to more complex abilities involving integration of information from various parts of a document (for example, reading a chart to determine if an employee is eligible for a particular benefit). Similar tests were devised for numeracy (such as comparing prices on two similar grocery items) and writing (filling out a bank deposit slip).

To aid in the interpretation of the results, respondents were categorized into skill levels based on their performance. For reading, the levels are:

**Level 1** — Canadians at this level have difficulty dealing with printed materials. They most likely identify themselves as people who cannot read.

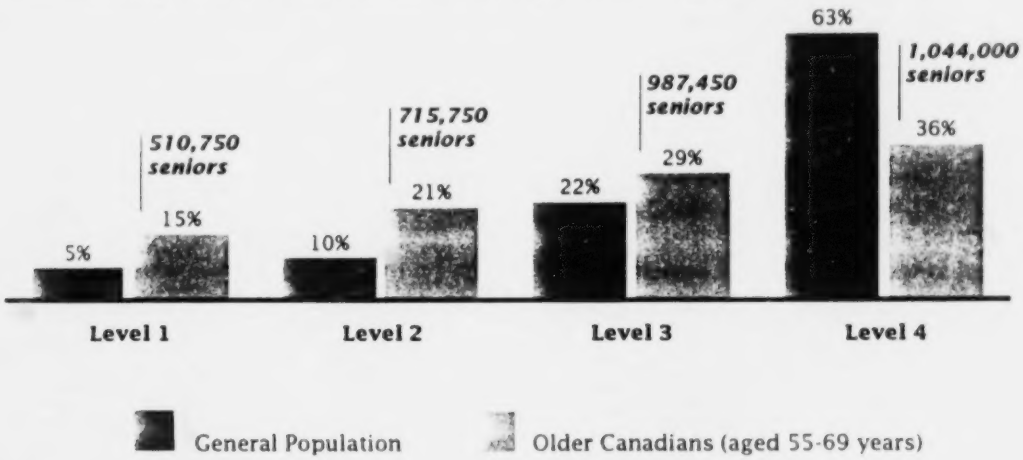
**Level 2** — Canadians at this level can use printed materials only for limited purposes such as finding a familiar word in a simple text. They would likely recognize themselves as having difficulties with common reading materials.

**Level 3** — Canadians at this level can use reading materials in a variety of situations, provided the material is simple, clearly laid out and the tasks involved are not too complex. While these people generally do not see themselves as having major reading difficulties, they tend to avoid situations requiring reading.

**Level 4** — Canadians at this level meet most everyday reading demands. This is a large and diverse group which exhibits a wide range of reading skills.

The survey divided Canadians into several age groups, the oldest of which was 55-69 years. While most of the people in this group have yet to reach the 'official' retirement age of 65, it is a large group who will be entering their senior years over the next

*Chart 1.* Reading skills of older Canadians compared to the general population.




***Source:*** *Statistics Canada, Survey of Literacy Skills Used in Daily Activities, 1989.*

decade. The survey failed to measure Canadians over age seventy, and also excluded those in institutions. Those who could not respond due to language problems or complete inability to deal with printed materials (such as being unable to recognize letters or numbers) were also excluded.

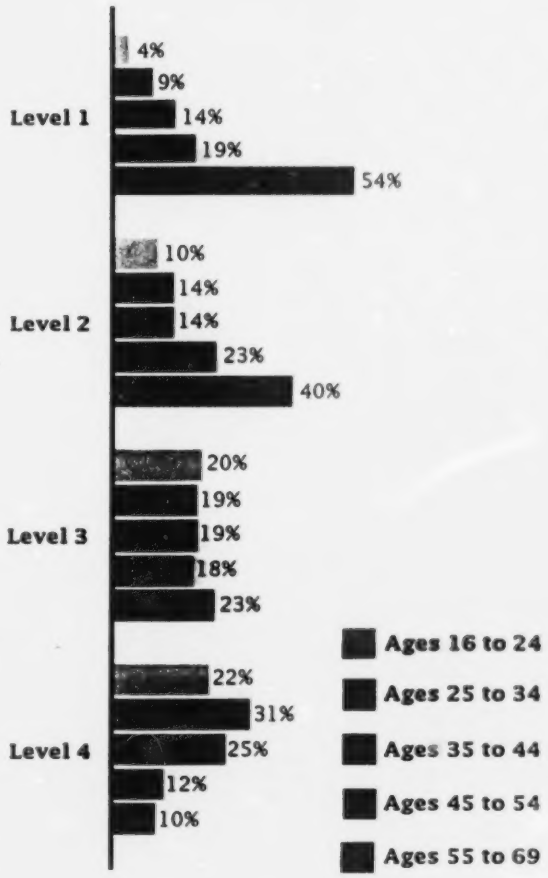
Chart 1 shows the results of the reading portion of the survey. While 63% of the general population achieved level 4, only 36% of the group aged 55-69 were found to be able to cope with everyday reading tasks. The remaining 64% of older Canadians experience some degree of difficulty — 29% who can handle simple reading tasks but who tend to avoid situations requiring reading, 21% who can use printed material for only limited purposes, and 15% who identify themselves as people who cannot read.

The top line of the chart applies these percentages to the population statistics for this age group (June 1990 figures from Statistics Canada). Totalling the three lower literacy levels reveals that 64% or 2,213,250 older Canadians experience some degree of trouble handling everyday reading demands. Again, this figure excludes those over age seventy; it is likely that their literacy skills are at least as poor, and if included, they would swell the ranks significantly.

Chart 2 shows the breakdown, again by age, in each reading level. Of all the Canadians in the lowest category of ability, over half (54%) are aged 55-69. This age group also accounts for 40% of level 2 readers and almost a quarter of those in level 3. In the level 4 group, which can handle everyday reading tasks without difficulty, only 10% are older Canadians. These figures suggest that the fight against illiteracy should be focused on the older population.

The results of the tests for numeracy (performing simple math) are similar.

*Chart 2.* Age distribution in each reading level.




***Source:*** *Statistics Canada, Survey of Literacy Skills Used in Daily Activities, 1989.*

**Throughout this document, we will be using the general term literacy to include the abilities to read, write and calculate.**

Further analysis of the data has shown that the problems of low literacy are particularly severe among certain groups of older people: males; francophones; those who live

in the Atlantic provinces; those with low incomes; people who achieved a low level of education; immigrants to Canada; and those whose parents had low literacy skills.

Why, in a developed and wealthy country like Canada, should such a problem have arisen? And why does it persist?

## *Historical perspectives*

The factors contributing to illiteracy are complex. Low literacy among seniors in particular, however, can be viewed primarily as the result of lack of opportunity due to historical circumstances and events.

The people in the survey group aged 55-69 were born between 1920 and 1935. They grew up in a very different Canada. The economy was largely based on agriculture, and much of the population lived in rural communities, on farms and in then-remote areas. Children were needed to work on the farm, and schooling was frequently interrupted. The quality of teaching, and of teacher-training, was not as high or consistent as it is today. Newspapers were usually available only in urban areas, and radio was the principal electronic medium.

These were simpler times, when a high level of literacy was simply not needed by most people. Indeed, for many it was considered a luxury, and out of reach. For francophones living outside of Québec, schooling was not available in their own language; they were forced to learn in English and suffer abuse because of their 'funny accent'.

Although immigration took place in several waves during this period, scant attention was paid to language or literacy levels of those entering the country and virtually no training was available for new Canadians. Cultural groups formed close-knit, 'ghettoized' communities and supported each other, usually in their own language. Often illiterate in their mother tongue, many never learned to speak English or French, let alone read.

World events shook Canadian society during the formative years of this age group. The Great Depression imposed grinding poverty and a sense of hopelessness on families. Schooling fell in importance as survival took precedence. When war was waged, education was interrupted again and typically was never resumed. Military experience gave rise to jobs after the war, but the government's open offer of further education was taken up by relatively few. The country and the economy were rebuilding, and money was to be made. People wanted to work and have families.

Interestingly, the war gave many women opportunities to learn new skills. The enormous support system needed to administer the country in wartime employed thousands of women in clerical and other tasks, which enhanced their literacy skills. Those whose husbands went to war looked after the management of the household. These factors may account for the higher levels of literacy among women in this age group.

As Canada grew into a more urban, industrial society, communication technology advanced and television made its way into the homes and minds of millions. It was now even easier to understand the news and be entertained without being literate.

However, society was becoming more complicated. The healthy economy spawned new industry, services and government. As the Baby Boom generation went to school,

education took priority. The health care system came of age and transportation opened doors to Canada and the world. It began to be harder to get by without literacy skills, but it was also harder to admit not being able to read in a society which had grown so much more sophisticated. In fact, the education system, focused exclusively on the young, made it next to impossible for adults to acquire or improve literacy skills.

Those who had failed to learn early in life paid for it throughout their prime earning years with lower-paying jobs and limited opportunities for promotion. The social stigma of being illiterate grew, but there were no answers.

This age group is now beginning to enter retirement. Lower-paying jobs during the earning years leads to a lower retirement income. Still unable to read, or read well, but living in a culture where print is the key to information, two thirds of this generation are at a serious disadvantage as they face the challenges of growing older.

### *Other factors*

What becomes of literacy skills over time? Like many skills, they can become rusty without regular use. For some, reading is simply not an enjoyable activity; for others, an admission of inability. The resulting avoidance over the years can lead to loss.

Research shows that the ability to read or otherwise process information does not decline with age; nor does the ability to learn. In fact, some researchers maintain that older learners benefit from increased intelligence due to their lifetime of experience, and frequently outperform their juniors. This puts the lie to the 'old dog/new tricks' myth, although attitudes often stand in the way.

The changing nature of our society also has an impact on reading skills. A reading level which may have been satisfactory forty years ago will not suffice in today's technological, computerized world, when higher levels of education in the general population have raised the norm. New vocabulary, new concepts, new attitudes demand constant upgrading of literacy skills to keep pace with our culture. Literacy is relative to time and society: it is dynamic, not static.

The normal physical changes that come with aging can also have a bearing on older people's reading ability, particularly vision. As eyesight declines, it becomes more difficult to see small print or read from a distance. High contrast is needed to separate letters from background, and some colours or colour combinations can hamper readability.

### *How literacy affects older adults today*

Aging brings many joys, but the physical, social and economic changes we experience in later years can cause hardship. Literacy levels have a direct bearing on how we cope with these changes.

The older Canadians of today are living longer and enjoying better health than previous generations; however, when health deteriorates, acute and chronic problems require increasing care and attention, both through the health care system and individually. Literacy skills help in managing good health, finding the right practitioner or service, following treatment, taking medication, organizing a healthy, safe lifestyle, responding to an emergency, engaging in leisure activities and so on.

Family changes have a greater impact among the older population. The death of a spouse, especially if the spouse was the only reader, can seriously erode the remaining partner's confidence and ability to manage independently. Living alone can in itself lead to depression and other health problems. Since women have a longer life expectancy than men, there are growing numbers of women finding themselves in these circumstances (there are twice as many women as men over the age of 85).

Older people depend heavily on their informal support networks for physical care and emotional support; typically, these networks provide literacy support as well for people who cannot read. But support networks are growing fragile. The changing patterns of today's families and increased mobility across the country are breaking down the traditional sources of support and leaving older people isolated and at risk. And as friends die, the circle gets smaller at the same time as the need is increasing. Many seniors are moving from rural to urban settings in search of services, but are less able to find or develop the informal support systems to which they were accustomed. A similar phenomenon occurs when seniors move from their established urban community to a new rural setting. These are critical factors for those with low literacy skills who rely on others to read for them.

Literacy is an important generational link within families. If an older parent's low literacy means more caregiving by a son or daughter is required, resentment may begin to grow. A 'gramps' who cannot fathom the most recent escapades of a group of mutant turtles will not be first choice for story time: children will be embarrassed to learn that their grandparents can't read, and parents may be reluctant to leave their children in the care of grandparents. Communication over distance will have to be by telephone, if at all, if letter-writing is not an option.

Certain population groups experience greater vulnerability because of low literacy skills and, the figures tell us, are more likely to fall into the lower skill levels. Immigrants to Canada, for example, both recent and established, often fail to become literate in either official language and are limited in their ability to get good jobs and otherwise participate fully in Canadian life. Many older francophones are not literate in their mother tongue, and are concerned about the survival of their language and culture as well as their own quality of life. Native people who have moved from the reserve to cities in search of employment and services have grown old in the urban environment and do not have traditional support systems that were available through the family network on the reserves.

Managing money is difficult enough in times of inflation, but poor skills in reading or calculating can complicate financial planning and management. The Statistics Canada survey revealed that people with low literacy also tend to have modest incomes: well over a third of those in the Level 1 category live on a household income of less than $20,000. These Canadians are trying to survive on a tight budget without the reading and calculating skills needed to manage one. By contrast, 82% of Level 4 readers have individual incomes of over $40,000. Rapid developments in technology often leave older people behind. Automatic banking machines,

shunned by many seniors, are a good example. And seniors with low literacy are especially vulnerable to the darker side of today's society — they may experience abuse, victimization, poverty and fraud.

Lack of literacy skills puts older people at risk in their daily lives. The possible results — poverty, isolation, poor health, depression, unnecessary institutionalization, perhaps even death — are unwarranted and unacceptable.

### *Seniors and literacy programs*

Given that so many older Canadians have low literacy skills, what is being done about the problem?

The short answer is practically nothing. In the course of **One Voice**'s *Leading to Read* project, it was revealed that fewer than 2% of students in existing literacy training programs are seniors.

Seniors may choose not to participate in literacy programs for a variety of reasons. Many older people are already coping to their satisfaction and do not see their literacy level as a barrier. Typically, their family and community support system compensates for their illiteracy. Perhaps their cultural context does not demand it. Others may be isolated socially or psychologically, be unaware of the opportunities to take advantage of programs, or lack the self confidence to grasp learning opportunities.

Many feel a sense of social stigma which makes them reluctant to admit that they cannot read.

*Leading to Read* also demonstrated that literacy training materials and teaching techniques are not suited to seniors. Courses are typically designed for young people, for workers, for single mothers, etc., despite the fact that most people with low literacy skills are seniors. If the skills or content being taught are not related to the daily lives of seniors, there is little motivation to learn. Many older people do not like to go out at night, feel uncomfortable in classrooms, and would rather learn in the company of others their own age or in a one-on-one situation. This suggests that locations which now attract seniors, such as Legion halls and seniors centres, would be good sites for literacy programs.

It is important to note that many seniors are involved as volunteer tutors in literacy programs. They are regarded as a valuable resource and there is no doubt that many more could be encouraged to become involved in such programs — especially to tutor other seniors.

### *Alternative forms of literacy*

While traditional definitions of literacy refer specifically to the skills of reading, writing and calculating, there is increasing recognition of alternative forms of literacy. These stem from the notion that the term literacy can encompass any way of effectively dealing with text and numbers — a much broader concept.

For example, older immigrants who do not read either official language often rely on their Canadian-born sons and daughters or grandchildren to read government notices, fill out forms, do their banking, and so on.

They are dealing with the printed material effectively, even though they are not literate themselves.

Similarly, couples divide household responsibilities and often the literacy-related tasks fall to the more literate partner. As a family unit, they can be seen as literate.

Community services also provide literacy services under this definition. Information services, income tax clinics, scribes, tellers, visiting homemakers who assist with budgeting, public health nurses who interpret medication instructions and help plan nutritious and/or therapeutic diets, all help form a literacy support network for people who might otherwise not be literate. Yet the end result is the same as if they were.

For many non-literate seniors, these literacy support networks are essential. Unfortunately, they are also just as fragile as their informal and social support networks. Families may move, a spouse may die, or services may not be available. Seniors may not have the ability to rebuild their literacy support network.

### *Trends to the future*

Demographics show us that the aging of Canada's population is occurring at an unprecedented rate. Not only is the proportion of older people increasing, but the sheer numbers are staggering. When the 55-69 age group studied by the Statistics Canada literacy survey turns 65-79, in just ten years, we can expect at least two million Canadian seniors to have trouble reading. Unless action is taken immediately, the problems associated with low literacy will seriously affect their lives as they age. The result will be a burden of care unimaginable in today's terms, for individuals and society as a whole.

We must make mention of other factors that will shape the Canadian society of the future. Immigration policies, for example, may alter the mix of ethnic minorities and the kinds of literacy issues among seniors. Inflation, the GST, interest rates and the questionable security of public and private pension plans will have considerable impact on seniors' incomes. There may be a widening gap between the 'haves' and 'have-nots'. It has already been pointed out that numeracy skills, necessary to manage a tight budget, are particularly low among those with low incomes.

The social service sector on which seniors rely to support independence is even now becoming increasingly complex. Those with low literacy will need special attention to help them access and use the system to meet their needs.

The private sector is reacting to the increasing influence of senior consumers (albeit slowly) in such areas as labelling, packaging, smart cards to control medication, etc. This is an opportunity to promote sensitivity to those with low literacy skills.

The large Baby Boom generation will begin to enter their retirement years in under two decades. Will their higher level of education (compared to today's 55-69 age group) ensure that they will be more literate? Or could they lose their literacy skills with age? Those who are literate in today's society will have to learn new skills to cope with tomorrow's technology. What factors will help them maintain literacy skills? What action can be taken to promote lifelong literacy and other

learning opportunities to ensure that literacy levels in Canada do not deteriorate? The technology of learning is rapidly changing, presenting both opportunities and challenges for older learners.

These are challenges that cannot be ignored, and questions that need answers.

### *The choice*

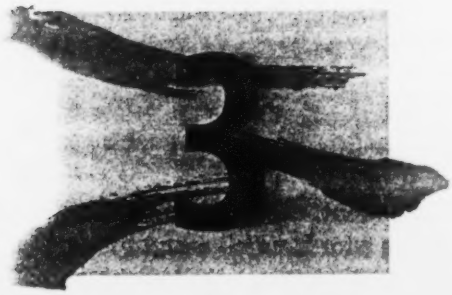
In this section we have learned that large numbers of older Canadians do not have the literacy skills necessary to survive in today's fast-paced, information-oriented world, much less take an active role. We have explored the historical context of a generation's missed opportunity, reviewed the implications of low literacy in everyday life for older people, and looked at reasons for seniors' low participation rate in literacy training programs. We have seen how the demographic trends will affect the numbers of older Canadians in the coming decades, and assessed the impact of low literacy on the society of the future.

We now have the option of dealing with the problem or ignoring it. Left unattended, it will not go away. **One Voice** believes that it is essential to act, and to act decisively, to solve the problem.

At a time when we have the tools, the expertise and the desire to act, it would be irresponsible to ignore this problem. When economists talk about burdening future generations with debt, they often neglect to assess the long-term impact of wise social investment. Consider the cost saving, for example, of a single individual who takes a literacy course (at a maximum public cost of, say, $500) and thereby avoids ten years of unnecessary institutionalization (which could realistically be estimated at $500,000). Consider as well the value to that individual in increased quality of life, not to mention the potential contribution to society as a family member, community member, volunteer, etc.

The alternative? Legions of older people suffering from ill health, depression, accidents; increased morbidity and mortality; surging demand for nursing home beds; and fragmented families and communities.

**One Voice** calls for immediate commitment to reduce the barriers caused by low literacy to enable older Canadians to enjoy a high quality of life and active participation in society.



# A Rationale: Literacy for Canada and Older Canadians

### *Guiding principles*

In order to provide a sound rationale for the Strategy, the Medicine Hat Task Force sketched out a philosophical framework within which to view the ways literacy affects Canadians, particularly seniors, and our society. These five guiding principles emerged.

1 *Being or becoming literate is a basic human rights entitlement throughout the lifespan of all Canadians, and is often a determining factor in gaining access to benefits to which an individual is entitled.*

Literacy is a fundamental entitlement that should arise from the universal right to a basic education. This right is not age-specific: lifelong opportunities must exist to gain basic literacy skills and for continuing education. These skills are important for a person's on-going development and self-realization as a whole person, enhancing individual expression and general enjoyment of life at all ages. They are also required for personal safety and security and the practical matters of managing day to day existence in an increasingly complex world.

Barriers experienced by people with limited literacy hamper access to other human rights and to such essential supports or benefits as education, medical care, or financial assistance programs. Literacy improves access to critical information and services and thereby enhances independence and quality of life.

While literacy is both a right and a responsibility, it is important to recognize the individual's right to choose. People should be given positive opportunities to take part in literacy programs but should not be forced to do so. The individual with low literacy has the right to remain so; but this is balanced by a social obligation to participate in self-management.

2 *Literacy is a basic skill for effective participation in Canada's democratic society.*

Literacy enables citizens to be informed about issues of significance to society and themselves. Limited literacy restricts the ability to participate in and influence society. Improved literacy increases Canadians' capacity to join in common purpose with other citizens and to contribute their insights and skills to the general welfare of our society.

Opportunities to participate exist in the voluntary sector, community development, the political system and so on. Seniors who have acquired a lifetime of experience and wisdom have much to give.

**3** *No Canadian should be discriminated against on the basis of literacy level. For those with low literacy skills, supports should be available to compensate.*

Discrimination against people with low literacy levels results in the failure of society to provide equitable access to services or benefits to which such people may be entitled. Governments, agencies, institutions, businesses and individuals must be alert to the possibility of discrimination on this basis, whether intentional or not.

This form of discrimination typically stems from poor methods of communication. Solutions include simplifying documentation, signage, etc.; providing information in alternative forms; and training staff to recognize low literacy and provide the required assistance in an effective manner.

The problem of elder abuse can be exacerbated by low literacy.

**4** *Canadians have a collective responsibility to recognize and respect the linguistic and cultural diversity of our nation in our approach to literacy issues and programs.*

Canada is a multicultural society that recognizes and values highly its rich and varied cultural and linguistic heritage. Literacy is central to experiencing and maintaining this heritage and ensuring its transmission to future generations.

Literacy in one of the two founding languages must be affirmed as a fundamental right for Canadian anglophones, francophones and allophones.

Toward native elders, who are custodians of an oral culture, we must be especially sensitive.

As immigration continues to increase the diversity of our people, literacy for those with languages and cultures other than English or French may come to mean different things. For some, particularly seniors, it may be a more urgent priority to improve literacy in a mother tongue than in English or French. Those providing literacy programs should recognize how different social and cultural systems work and adapt accordingly.

**5** *Literacy levels within our population have important economic costs and benefits both to individuals and to Canadian society as a whole. Literacy is central to the maintenance of Canada's society, economy and culture.*

A literate and skilled populace marks a civilized and responsible nation. As a developed, wealthy country, Canada can and should encourage its citizens to be literate.

Lack of literacy skills is often associated with illness and poverty, imprisonment and heavy dependence on social programs, all of which are costly to society. While not a universal answer to such conditions, literacy is one of the doors to a better life and a stronger society.

Literacy is strongly linked with lifelong earning potential. With rapid changes in all areas of employment, both society and individuals stand to gain from increased literacy to respond to the increasing demand for specific skills and the pressures of international competition. High levels of literacy are of strategic importance for the economic well-being of the country.

Literacy is a basic tool which allows individuals to learn about our heritage, values and culture, to contribute to them, and to ensure their transmission to a new generation.

### *The Cedar Glen Declaration*

In 1987 a group representing the major literacy organizations in Canada met to consider the public policy issues relating to the problem of illiteracy in Canada. The outcome was a Declaration of principles which have influenced the directions of the literacy community and governments ever since.

The Declaration affirmed the right of all Canadians to basic education, including literacy skills, regardless of age. It urged governments at all levels to establish a priority for literacy in public policy, to provide stable financial support, and coordinate efforts in consultation with literacy practitioners and learners.

The principles outlined in the Cedar Glen Declaration have strongly influenced the development of this Strategy.

### *Defining a goal*

Our analysis has shown that low literacy frequently prevents older Canadians from full participation in and enjoyment of life in our society. **One Voice** and its Medicine Hat Task Force call for action to reduce the barriers caused by low literacy.

What do we hope to achieve through such action? Casting our minds to the ideal future, let us envision a society where everyone is or has become perfectly literate, and thus able to participate fully.

Is this possible? Is it likely? Current realities suggest that it is not. Our own principles listed above recognize that it is the right of the individual not to become literate. Nor is everyone capable of becoming completely literate — there will always be degrees. The Task Force realized that we must take this fact into account and adjust our vision.

In the ideal society, then, those who can and wish to become literate have done so; and those who will not or cannot, or who are partially literate, are sustained by a community or system which is sensitive and supportive of people with low literacy skills. The Medicine Hat Task Force termed this support 'compensation', and strongly urged that it be integral to the Strategy.

In such a society, low literacy is no longer a barrier to achieving a high quality of life and full participation.

This, then, is the goal we wish to attain: a society where low literacy is not a barrier to full participation of seniors.

### Methods

The most obvious way to achieve the goal is to **raise literacy levels among older Canadians**, primarily by increasing literacy training among seniors. This forms one main thrust of **One Voice**'s *National Literacy Strategy for Older Canadians.*

It should be noted that inherent in the Strategy is prevention: we must work to prevent the loss of literacy skills. We must also aim to prevent the creation of future generations of seniors with low literacy. Research shows that the main cause of older adult illiteracy is young adult illiteracy!

The second objective is to **create a supportive system to sustain seniors who, for whatever reason, are not literate**. This is the other main thrust of the Strategy. It involves establishing the appropriate compensation supports and identifying existing ones and improving their capacity to serve people with low literacy skills.

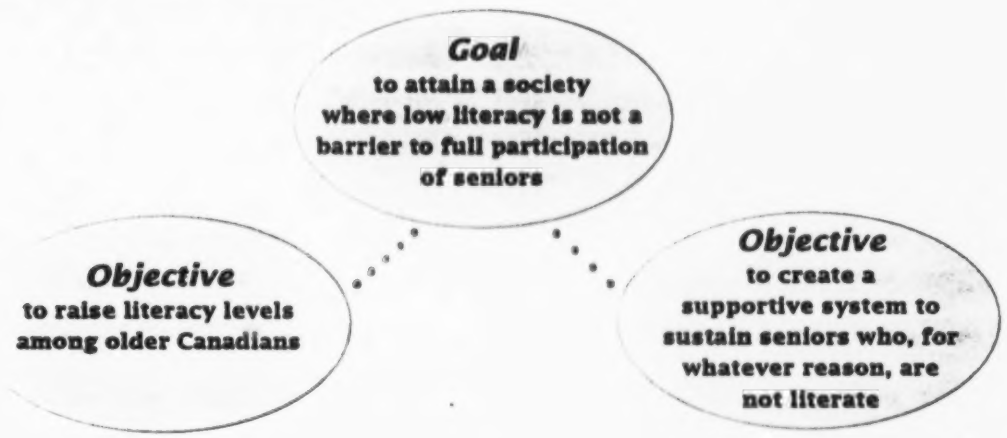
Both objectives are indicated on on the schematic diagram of the Strategy.

### Moving to action

In preparing action plans to accomplish the goal, there will be some strategies common to both objectives, and some which are tailored to one or the other. The Three-year Start-up Plan outlined in the next section recognizes this in its design, and is driven by the guiding principles enunciated by the Medicine Hat Task Force.

Much of the content of the plan stems from recommendations which emerged from the **One Voice** conference, ***Learning — That's Life!*** (Ottawa, April 1990). The Conference Report, which summarizes the proceedings and recommendations, is available from **One Voice**.

In addition, the Medicine Hat Task Force spent considerable time developing its own recommendations for action, which have also contributed substantially to this plan. Working groups examined some of the potential problems in implementing such a plan, and listed a series of questions which should be asked and answered as the Plan unfolds. A full list of the recommendations and questions will be found in the Appendix.


Goal
to attain a society where low literacy is not a barrier to full participation of seniors
Objective
to raise literacy levels among older Canadians
Objective
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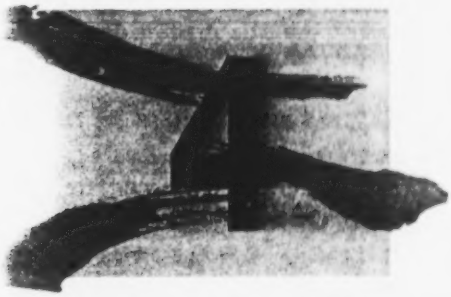


# A Three Year Start-up Plan

A mammoth task lies ahead of us. In order to achieve our goal, the commitment, time, talents and resources of many individuals and organizations will be required.

Rome wasn't built in a day, and nor will our work see its conclusion in the near future. It is always easier to accomplish big things in little pieces. We have therefore designed a Three-year Start-up Plan which will give impetus to the initiative and enable us to lay the groundwork for the longer term.

## *1. Overview*

The Three-year Start-up Plan is intended to provide the groundwork and impetus for a long-term, on-going solution to the problem of older adult illiteracy in Canada. Its approach to the problem, derived from the rationale established by the Medicine Hat Task Force, is two-fold: to raise the level of literacy among older Canadians, and, recognizing that not all seniors will or can become fully literate, to improve supports for seniors with low literacy levels. The Plan is ambitious but realistic.

### *The Canadian Coalition for Older Adult Literacy*

The Plan calls for the creation of a Canadian Coalition for Older Adult Literacy to guide the initiative. Following the successful model of the Canadian Coalition on Medication Use and the Elderly (funded by the Seniors Independence Program of Health and Welfare Canada), the literacy Coalition is composed of the principal stakeholders in the issue. Importantly, it and the Plan are "seniors driven" — a critical factor in ensuring participation of older Canadians not only in the process but also in the effective take-up of the program and a successful outcome for the initiative.

Partners in the Coalition, in addition to seniors, include the literacy community, learners, researchers, the education sector, governments (federal, provincial and municipal), labour and special interest groups, the corporate sector, professionals, the media, the publishing and book trade, communities, and the retail and service sectors. Each group represents a whole network of its own, with enormous potential for communication, involvement and provision of resources.

Most of these groups have already taken an active role as partners in **One Voice**'s literacy work so far, and all have particular contributions to make to the strategy, such as program design and delivery, promotion, funding, and so on. Clearly, no one group could succeed in this venture alone; the combined participation of all partners on the Coalition, however, will ensure that activities related to the issue are coordinated, and that all key players are fully involved and committed to success.

Specific responsibilities and tasks will be directed to committees of the Coalition, such as research, awareness, program design, funding, etc. Staffed by a Secretariat, the Coalition will guide the development and implementation of the action plan, stimulate project development, assemble the necessary resources, monitor activities and assess the results. Individual members will provide expertise where appropriate and will be responsible for promoting and coordinating the involvement of the sectors they represent. The Coalition will work closely with the Movement for Canadian Literacy and the national federation for francophone literacy, la Fédération canadienne pour l'alphabétisation en français.

*ction*

Over the three years, the Plan follows a process of organization, set-up and implementation. During the first year, the Coalition is established and work begins immediately on the development of programming; it is not until the third year that the major promotion phase begins. The reasoning for this approach stems from the research which tells us that existing literacy programming is, to a large extent, both inadequate and unsuitable for seniors, and that training for compensation or support providers is equally lacking. Special attention and major efforts are needed for francophones and ethnic groups. To cope with this reality, it is necessary to create a reasonable "supply" of programs before creating the "demand". Year 2, the set-up year, is devoted to establishing this supply and the appropriate delivery mechanisms and designing a promotion scheme; then, in the third year, the Plan moves into the main thrust of the awareness campaign to promote uptake of the programs.

Evaluation will be on-going throughout the three years, to assess the impact of the Plan and also the effectiveness of the Coalition as a coordinating body. In addition, the Plan calls for preparation for the long term, planning further action and developing an ongoing funding strategy.

It is extremely unlikely that at the end of three years the Coalition will have reached the objectives of the Strategy; it would be realistic to allow a ten or twenty year time frame to attain the desired results. Nevertheless, the Three-year Start-up Plan will provide an underlying

commitment, the tools and the impetus to carry forward for many years towards the achievement of our goal: a society where the barriers of low literacy are overcome to permit all Canadians to grow older enjoying full participation, greater personal fulfillment, economic independence, safety and security, and a high quality of life.

## *2. The Canadian Coalition for Older Adult Literacy*

**One Voice** recommends that the responsibility for the implementation of the *National Literacy Strategy for Older Canadians* be given to the Canadian Coalition for Older Adult Literacy. This proposed body, composed of the key players in the initiative, will plan, stimulate, direct, coordinate, monitor and evaluate the activities of the Plan.

Is it really necessary to create a new organization for this initiative? Given the short span of the Three-year Start-up Plan, the early commitment and active participation of the many different players are needed to ensure the Plan's success. As a broad partnership, the Coalition would be the most effective means of rapidly securing an alliance of interests. Such a body, varied in its parts but dynamic and committed in the whole, brings a wealth of expertise to the table and provides a comprehensive network to coordinate and support the activities.

The model is patterned after the Canadian Coalition on Medication Use and the Elderly (funded by the Seniors Independence Program of Health and Welfare Canada), and is particularly cost effective. Because members typically volunteer their participation, the operation requires minimal funds to cover travel and meeting costs and the Coalition's secretariat, which provides staff support and carries out the tasks identified by the Coalition and its committees (the Secretariat would logically be housed with one of the Coalition members, likely **One Voice**). This leaves the bulk of the funding to be focused on the projects and activities of the Plan. The Coalition may be the most logical body to administer project funds (but would not deliver on-going programs itself).

In addition, the model offers centralized accountability and evaluation, fosters and facilitates communication and collaboration among its members, and generates a synergy which enhances the action of the group. Another advantage is that the organization, being task-specific, is temporary, and therefore requires no long-term funding commitment.

Over the past two years of **One Voice**'s work on older adult literacy, most of the potential members of the Coalition have already been brought together or consulted on these issues. In fact, many were involved in the development of this *National Literacy Strategy for Older Canadians*, coordinated by **One Voice**. The idea of the Coalition is strongly supported.

Committees of the Coalition would likely include Program Development and Delivery, Awareness, Research, Long-Term Planning, Funding and an Executive Committee to be struck at the beginning of the second year.

Membership, responsibilities and tasks of the Coalition are discussed in detail in the following section.

### *3. Partners*

The Coalition derives its strength and effectiveness from the members who compose it. In theory, the individuals who sit on the Coalition will contribute their expertise to the work of the Committees and ensure support; but in practice, the greater contribution will be the partnerships and networks they represent and actively engage in the implementation of the Plan. All partners are expected to act as a direct link with their respective networks and to promote support of and involvement in the activities of the Plan. **One Voice** will take great care to select the representatives on the basis of these capabilities.

To function effectively, the Coalition should be made up of no more than thirty individuals. However, this should not prevent Committees of the Coalition from drawing their membership from beyond the direct members of the Coalition, depending on the expertise required.

In the following breakdown, each potential member group is listed by general area. A brief description of the composition of that group follows, as well as suggested Committee work and specific tasks to be undertaken.

#### *Seniors*

**Description:** individual seniors; local, provincial and national seniors groups, secretariats and advisory councils; special interest seniors groups (such as the Royal Canadian Legion, Canadian Institute of Seniors Centres, Federal Superannuates National Association)

**Committees:** all Committees

**Tasks:** advise on the needs and characteristics of seniors in designing projects and plans; promote awareness among seniors through groups and one-to-one; promote awareness among those serving seniors; promote action at appropriate levels; deliver programs (seniors centres, seniors groups, community, volunteers, one-on-one peer tutoring, etc.); take literacy training; establish seniors fund for ongoing resources

#### *Literacy community*

**Description:** providers of literacy programs; organizations and other coalitions of literacy providers (e.g. Laubach, la Fédération canadienne pour l'alphabétisation en français, Movement for Canadian Literacy, Frontier College); researchers specializing in literacy research; volunteers in literacy programs; schools, other institutions providing literacy training

**Committees:** all Committees

**Tasks:** identify areas for research; examine and modify existing programs to suit seniors; develop innovative programs for seniors, including special groups; identify and develop new delivery mechanisms; forge links with education sector; expand own concept of literacy to include support; participate in awareness activities; promote older adult literacy within the literacy community and outside; assess and evaluate; identify gaps and opportunities; implement and facilitate new programming; encourage partnerships wherever possible, especially at the community level

#### *Learners*

**Description:** adult and older adult learners; those in training as well as those who have finished

**Committees:** all Committees

**Tasks:** advise on the needs of learners; assist in program assessment; identify ways of reaching new learners in awareness strategy

*Researchers*

**Description:** academic and professional researchers specializing in literacy and related fields; researchers in other areas related to seniors, such as the Canadian Association on Gerontology; evaluation methodologists; market research and communications specialists; field researchers specializing in program design and delivery

**Committees:** Research; Program; Awareness; Planning; Executive

**Tasks:** develop three-year, priorized research plan; identify potential researchers/bodies and resources; develop evaluation program; collect and analyze baseline data; stimulate research into literacy-related characteristics of older Canadians; assess existing programs for suitability to seniors and recommend changes; promote and study innovative programs and delivery mechanisms; identify gaps and opportunities for special attention; review and recommend project proposals; monitor results of research; advise on dissemination of research results; direct research into factors and elements of Awareness Plan; devise cost-benefit analysis plan; oversee concluding evaluation of Coalition and its impact; contribute to research component of long-term plan and future action plan

*Education sector*

**Description:** schools boards; community colleges; universities; provincial ministries of education; language training programs (ESL, FSL, ethnic tongues); Elderhostel, l'Université du troisième âge

**Committees:** Program; Awareness; Funding; Planning; Research

**Tasks:** promote expansion of educational mandate to include lifelong learning and literacy, including prevention of illiteracy; strengthen links with literacy sector, communities; assist in awareness, promotion, program design and delivery; promote policy change as necessary

*Governments*

**Description:** federal, provincial, regional, municipal; politicians, policy advisors, administrators/bureaucrats; seniors secretariats, education and labour departments, and other branches with interest in literacy

**Committees:** all Committees

**Tasks:** commit funding, staff and other resources; promote policies within bureaucracy and programs, particularly to establish literacy as a long-term priority; strengthen inter- and intra-governmental networks to focus on the issue; facilitate coordination; promote and fund research; increase awareness at all levels, especially government services dealing with the public; promote clear writing and communication in government; implement training programs for older government employees; promote coordination with education and literacy sectors; assist community services to modify programs; assist retail/service and other sectors to train

*Labour*

**Description:** unions; labour organizations; retiree organizations

**Committees:** Program, Awareness, Funding

**Tasks:** promote awareness among workers, management, retirees; identify workplace literacy training as a preventive method; link with education sector and literacy community; sponsor programs (workers train retirees, etc.); contribute funding; participate in research; promote sensitivity/ skills training in workers

*Special interest groups*

**Description:** groups representing populations, such as cultural and linguistic groups; others, such as inmates, disabled persons, women, learning disabilities, etc.

**Committees:** Program, Research, Awareness, Planning

**Tasks:** coordinate activities with other initiatives; promote awareness in specific sectors; identify research gaps and opportunities; develop new delivery mechanisms; develop new programs (content, teaching style, etc.) for special groups

*Corporate sector*

**Description:** Retail, industry, manufacturing, communications, etc.; foundations

**Committees:** Awareness, Funding, Planning

**Tasks:** promote awareness and action in specific, related sectors; develop workplace and retiree training programs; promote training for staff dealing with public; redesign products, packaging, labeling, marketing; commit funding; advise on funding, marketing, research

*Professionals*

**Description:** lawyers, physicians, health care workers, pharmacists, social workers, finance industry, etc.

**Committees:** Program, Awareness, Research

**Tasks:** promote awareness in professions and staff, skills in serving clients with low literacy; promote literacy training among clients; identify special areas for priority, such as medication use; develop special programs

*Media*

**Description:** print, radio, television, cable, video; seniors media

**Committees:** Program, Awareness, Funding, Research

**Tasks:** advise on and help develop Awareness Plan; assist in implementing awareness; advise on program design, especially media-related; produce programs; deliver programs; commit corporate sponsorship; promote awareness within media — clear writing, image, etc.

*Publishers, book trade*

**Description:** book publishers and book sellers

**Committees:** Program; Awareness; Funding

**Tasks:** promote awareness and participation; develop and produce program materials; disseminate materials; link with literacy community and libraries; commit corporate sponsorship; support local initiatives

*Communities*

**Description:** local planning bodies; community agencies, Board of Directors; libraries; churches; volunteers; local business, service clubs, media, etc.

**Committees:** Program; Awareness; Funding; Planning; Research

**Tasks:** promote awareness and participation at local level; strengthen community supports; encourage volunteers; identify special needs in community; local coordination and partnerships

***Retail/service sector***

**Description:** department stores, retail chains; cashiers, sales people, receptionists, drivers, etc.; home care workers, agency staff

**Committees:** Program; Awareness; Research

**Tasks:** promote awareness in staff; review service design/delivery and modify; promote training — workers, clients; provide local support and encouragement for programs; work together to create "the friendly market place"

***Note:** Although many partners listed have been assigned to several Committees, their participation may not be required at all stages. Rather, they will be called on to advise on specific aspects of Committee work.*

## *4. Activities*

This section details the specific areas of action which comprise the Plan. Links with individual partners of the Coalition will be found in the "Partners" section.

Although we have designed the Plan on the basis of three years and three central activities (organization, set-up and implementation), much of the work spans these divisions.

***Year 1***

This year is one of organization. The Coalition is formed and its committees established, partnerships are built, the long-term plan is developed in detail and refined, and its early stages are set in motion.

**1** *Form the Canadian Coalition for Older Adult Literacy.* The partners identified by **One Voice** for membership in the Coalition will be approached and asked to confirm their participation on the Coalition (a full three-year term is recommended). Many have already indicated to us their strong support of the concept and have agreed to act as members; new contacts will also be made as necessary.

**One Voice** will immediately proceed to seek funding to support the core functioning of the Coalition and its secretariat.

The Coalition will meet three times during the first year. The tasks for the first meeting in will consist of a review of the Terms of Reference for the Coalition, a review of the Strategy, a review of the Three-Year Start-up Plan, and a review of the proposed budget. A Chair will be

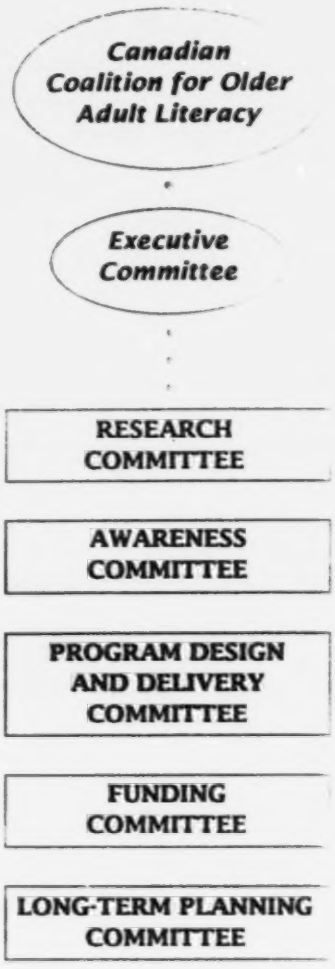
identified and Committees struck, including Research, Awareness, Program Design and Delivery, Funding and Long-term Planning (see organizational chart opposite). Proposed Terms of Reference and workplans for the Committees will be reviewed and priorities for action will be identified. Decisions about the structure, responsibilities, staffing and location of the Coalition secretariat will be made. (See the Appendix for Draft Terms of Reference for the Coalition and functions to be undertaken by the Secretariat.)

The Coalition will function in both official languages.

Following this first meeting, members of the Coalition will be responsible for communicating with their respective networks to explain the Strategy and their role in the Action Plan, seeking endorsement and commitment of support.

In the meantime, Coalition Committees will meet separately to review and refine the Terms of Reference and workplans. At this stage, some Committees will be required to develop projects. The Funding Committee will be responsible at this stage for determining, in consultation with potential funders, the best way to administer project funds — project by project, or centrally, through the Coalition.

The results of these meetings will be the focus of the second meeting of the full Coalition, which will review and approve the workplans and coordinate the proposed activities. This will form the basis of the Long-term Action Plan.




The second meeting will also explore the potential for strengthening the network of partnerships within and beyond the membership of the Coalition. Members will report on the endorsement of the Strategy and Plan by their own communities and make recommendations for new partnerships. Links with the international community will be explored.

At this point, several pilot projects will be ready for implementation. The Coalition will approve their design and recommend funding as appropriate.

At the third meeting, the Coalition will review the functioning of its structure, the Committees and the secretariat and make any necessary changes. It will receive reports on the progress of pilot projects and examine and approve Committee reports. It will also endorse the Awareness Plan.

As the Coalition will be meeting less frequently in the second and third years, it will appoint an Executive Committee at the end of the first year to be charged with decision-making between meetings. The Executive will include Committee Chairs.

The Coalition will discuss the elements of its first year-end report, which will subsequently be drafted and approved by the Executive for submission to Coalition members, funders and **One Voice** at the end of the year.

**2** *Formulate a Long-term Plan.* Because the Coalition and its action plan are initially limited to a three-year term, it will be necessary for the Coalition to determine how to maximize the impact of the three years, as well as ensure ongoing commitment and action after that time.

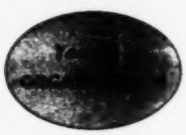
Many considerations will drive design of the Long-term Plan. All should stem from and be compatible with the guiding principles of the Strategy. The following list, by no means complete, suggests some of the questions to be asked.

- *Responsibility and coordination.* Who will continue the initiative? Will it run by itself, or will it require a lead organization or the continued existence of the Coalition? How will activities be coordinated? How will links with other programs be maintained or initiated?
- *Research requirements.* What have we learned over the first three years? What have we achieved, and what areas remain to be explored? What target groups will require special attention, and what is the nature of that attention? What are the new literacy-related needs of older Canadians in a changing society? Are societal attitudes and behaviour changing? Can/should they be influenced?
- *Partners.* What are the strongest links in this venture? The weakest? Why? How can they be strengthened and/or maintained? What new partners are emerging? What should be the responsibilities of partners? Are there potential conflicts?
- *Program design and delivery.* How much can realistically be accomplished in three years to improve the design of literacy programs for seniors and support training programs for other workers? What new models will be needed? How effective are the new delivery systems planned for the first three years, and what additional mechanisms will need to be developed? How has the potential for seniors as a resource been realized, and to what degree? What special populations are still not being served with programs designed for their needs?
- *Awareness, promotion and uptake.* How can the Coalition maximize uptake in the first three years? What elements can be incorporated into the Awareness Plan to ensure its long-term impact? What is required in terms of awareness to move to the next stage, motivation? What groups need special attention in awareness and promotion strategies? What is the measurable relationship between the Awareness Plan and uptake? How is equal access to programs and support ensured across Canada, in different regions (urban, rural, etc.)?
- *Funding.* What sources of funding are available, and what sources have not been explored? What is the participation of Coalition partners? How should specific sectors with funding potential be approached? What is the appropriate vehicle to receive and administer funds? What is the most cost-effective use of funding contributions? What is the value of the contribution of volunteer time, both for and by seniors?

- *Evaluation.* What impact are programs having on seniors — in their daily lives, in their broader participation, in their contributions to society? What are the measurable outcomes in terms of health, independence, family and social networks, financial status, etc.? Is another National Literacy Survey required? What baseline data and methodologies are required to assess the effectiveness and cost-effectiveness of the Strategy? What are realistic time periods for measurement?

As these and other questions are answered, and as the first year draws to a close, it should become clear how the first three years fit into the larger picture, how they can be designed for maximum impact and what the long-term requirements will be for the Strategy.

The Long-term Plan will be revisited in the third year for further development.



**3** *Stimulate research.* Reviews of the literature have revealed a serious lack of research into the problems and implications of older adult illiteracy, not only here in Canada but around the world. An effective program relies on solid research to identify opportunities for attention, to provide factual information for developing solutions, and to gather and analyze the data required for evaluation. The first year of the Plan lays the groundwork for the next two, as well as for the Long-term Plan; the research component is central to this effort.

Research will be coordinated by the Research Committee of the Coalition, who will immediately forge links with the literacy community and other related researchers (the National Adult Literacy Database is a good example). Once it has identified priorities, it will actively seek out qualified researchers and potential funders, receive, review and coordinate funding proposals, and monitor and disseminate the results as appropriate.

**a** *Opportunities for attention.* In conducting literature reviews of research into older adult literacy in Canada and the state of literacy among older francophones, **One Voice** has uncovered substantial gaps in our knowledge (see the Appendix for titles of these reports). The Research Committee will enumerate these gaps (and perhaps commission research to identify others) and set priorities, approaches, appropriate research bodies and individuals, funding sources and a schedule. It is expected that the first two years will be devoted to key research questions required for the design, promotion and evaluation of literacy and community support training programs.

**b** *Developing solutions.* Three major components make up the "solutions" category for research.

- *Review existing programs and their delivery.* Although many literacy training programs exist, our research shows they are reaching very low numbers of seniors. Why? This phase of the research will examine existing programs (general as well as those specifically for seniors) in terms of their design and delivery and assess their potential for modification to suit the needs of seniors and special groups within the seniors population. Which programs have the greatest likelihood of improving? What changes can be made to the delivery mechanisms? How

should such changes be implemented? What data will be needed to assess the impact of changes?

- *Develop innovative programs and delivery mechanisms.* This creative part of the research will involve the design and testing of new programs which will take into account the special needs of seniors as learners and tutors, program content and teaching/delivery methods. Programs for support will be designed to train community workers, professionals and the retail/service sector in the sensitivity and skills required to better serve older adults with low literacy. Opportunities for new delivery mechanisms will be explored. The partnerships on the Coalition will be especially important to the Research Committee during this phase.
- *Research awareness, attitudes and target populations.* As the Awareness Plan is developed in the first year, critical information will be required to determine target populations, communications strategies, appropriate promotional techniques, etc. This type of market research will be coordinated jointly by the Research Committee and the Awareness Committee.

c *Evaluation.* For both the three years of Phase 1 and the long term plan, baseline data and an evaluation methodology will be required. Evaluation will be carried out on key elements of the Strategy and Action Plan, on the effectiveness of the Coalition itself as a coordinating body, and on the long-term impact of the Strategy. The Research Committee will oversee the design of the evaluation plan and the collection of baseline data, and will coordinate the production of the Evaluation section of the year-end report.

4 *Develop Awareness Plan.* In the context of this action plan, the concept of awareness entails three stages: education, where the facts and implications of older adult literacy are conveyed and understood; motivation, where attitude change takes place; and action, where the target understands what can be done and proceeds to do it.

Against this process are arrayed the elements of target populations and communications methods, both of which are also linked.

The design of the Three-year Start-up Plan calls for a phased awareness plan, where the first targets are the key players and partners on the Coalition, followed by program providers and deliverers in the second year, and the main target population of seniors and support workers in the third year. This ensures that when the demand is created by the activities of the third year, the infrastructure or "supply" has been prepared to meet that demand. It also permits adequate time to gather the knowledge required to design a truly effective public awareness campaign.

The Awareness Plan is perhaps the most critical element of the Action Plan. Central to the message should be the idea that seniors are active, contributing members of society who are taking responsibility for themselves in this initiative. It is beyond the scope of this paper to provide a detailed plan; that is the job of the Awareness Committee of the Coalition to undertake in its first year. However, a cursory outline of the elements of a suggested plan will be found in the Appendix.

*Year 2*

Many of the activities of the first year will begin to bear fruit in the second year. Some of these tasks will be ongoing, such as research and program development; the Awareness Plan will begin its second phase; and a new task, the design of a long-term funding strategy, will be undertaken.

The principal focus of the second year is to set up the infrastructure of programs, delivery mechanisms and awareness to ensure that the "supply" side is well established by the third year, when the major thrust of the Awareness Plan creates the "demand".

The full Coalition will meet twice during the year to receive reports on progress from the Committees, identify any problem areas and ensure that its plan and its own role continue to be effective. It will also review the operations of the secretariat and, in light of the expected significant increase in workload for this year, may recommend that its funding be boosted.

1 *Continue research and program development.* The work begun in the organizational year will guide the Research and Program Committees as they plan for implementation. Particular attention will be paid to evaluation of pilot projects to determine which have been most successful in attracting seniors and meeting their needs. Also during this year the special needs groups identified in the first year will receive attention in program development.

The Research Committee will prepare its plan for the major evaluation to take place in the third year.

2 *Establish delivery mechanisms.* The innovations in delivery developed in the first year will have identified opportunities for new delivery partners. These will be explored and arrangements made for dissemination of programs, training, etc. in preparation for the third year. Established and new deliverers/providers will be linked together in a network to facilitate communication and sharing of ideas and experience.

The bulk of this work will be the responsibility of the Program Committee, with liaison with the Research and Awareness Committees.

3 *Implement Awareness Plan.* Providers and promoters are the targets of this phase of the Awareness Plan. It will be necessary to educate them in the dimensions of the issue, motivate them to become part of the solution, and then provide the tools or mechanisms to enable them to act.

- *Providers.* This group includes those already providing literacy training, who may be encouraged to expand their programs to include or encourage seniors. It includes those who are in a good position to provide training to those who support seniors in the community, such as professionals and the retail/service sector. It also includes groups who may not now be providing programs, but who may become providers over the course of implementation of the Strategy — seniors' centres, labour, the Royal Canadian Legion, libraries, cable television networks, etc.

These groups will be approached with a message tailored to their characteristics and potential involvement. Once their participation has been secured, a plan of action can be prepared and put into effect over this and the next year.

- *Promoters.* While the major promoters of literacy training are the providers themselves, many other groups can and must become involved in promoting literacy for older adults. These groups will likewise be approached through the Awareness Plan.

Perhaps the most important group is seniors themselves, through their organizations and individually. The networks of seniors groups, such as the **One Voice** network and the Legion, are strong and well-organized. Increasingly, they have the mechanisms in place to reach directly and effectively to the grass-roots level through their provincial and local affiliates and individual memberships. These groups can not only encourage uptake but can lobby for local support of the initiative. As the number of new learners increases, they too can be linked in a network and become key players in promotion. Families and friends can also help.

Also included under this group are the many service people and professionals who work with seniors. While no one can force a senior to become literate, these workers have the advantage of frequent contact and an understanding of the individual's life circumstances. They themselves will be candidates for literacy support training.

Another critical group is the media. The bulk of their work in the second year will be to prepare for the third year. Through their representation on the Coalition they will assist in the design of the Awareness Plan, which will include the major phase in the third year to promote uptake. This aspect of the plan will involve many partners in the media world, including television, radio, newspapers and magazines, all of whom must be touched by this phase of the Awareness Plan and brought onside.

Finally, but no less significant, are those who promote the ongoing support of the initiative, particularly in the context of funding. The corporate sector will play a part in this function, as will labour, governments, the education sector, and others as listed in the long-term funding strategy below.

**4** *Develop a long-term funding strategy.* It is unrealistic to make any assumptions about assured funding for this initiative, either for the short term or into the future; it could go either way depending on promotion. It is essential, then, for the Coalition's Funding Committee to prepare a detailed and comprehensive long-term funding strategy to support the venture into the future.

The first two years of the Start-up Plan will give the Coalition a clear idea of who the major players are and the level of their commitment. During this time, opportunities for partnerships will have been explored and many of these will have funding potential. By the end of the second year, the initiative will have generated enough attention and shown its potential for success to a point where new funders can easily be attracted.

There are several key groups to be approached for long-term funding for the initiative.

- *Governments.* At all levels, governments have much to gain from improved literacy levels and improved supports for seniors with low literacy, primarily in

terms of their ability to remain living independently. Research in the early years of the strategy's implementation will undoubtedly show the cost-effectiveness of improved literacy with respect to healthcare and community support dollars. A kind of "social investment", improving literacy is a way governments can prevent unnecessary program spending increases in other departments. In addition, training government workers to better serve clients with low literacy will enhance program delivery.

- *Education sector.* As the population ages and more credence is given to the concept of lifelong learning, the education sector is likely to continue its current expansion of education for adults to include older adult literacy programs. Educators will be encouraged to recognize their responsibility to provide adequate training in literacy skills throughout the life span, as well as to prevent their loss. The cost of these programs will be incorporated into the budgets of local school boards and provincial education ministries.

It will be important in the early stages of the Plan to discuss the jurisdictional issues of education, literacy and governments to arrive at an understanding of the roles and responsibilities of each sector.

- *Labour.* There is great potential for labour to recognize its responsibility to prepare workers for retirement, which may include literacy training in the workplace, and to continue supporting its retired members. For example, a volunteer tutoring program delivered by workers to retirees might prove to be a valuable training method with mutual benefits. Such an initiative could be easily managed and funded by a union.
- *Corporate sector.* The business world is paying increasing attention to the aging population and companies are actively seeking ways to be good corporate citizens. The older adult literacy initiative is a positive, high-profile and direct way of supporting seniors. There are natural affinities with many industries; for example, a pharmaceutical manufacturer is currently anxious to fund a special program to train pharmacists to help their low-literate older customers. Publishers could contribute to the development of training materials, and have them distributed through affiliated booksellers. Private television and cable owners could support on-air literacy training and promotional spots.

Business will also recognize that in an aging society its workforce will be older. In a labour market which requires skills, it will be in the interests of management to promote literacy training for its workers.

Seniors are a growing consumer group. Businesses which respond positively to their characteristics will be far ahead of those who neglect the aging population.

- *Retail/Service Sector.* Major department stores, banks, retail chains, the hospitality industry, etc. are good partners for supporting the training of their staff members in the skills to support low-literate older customers. They could be approached not only to cover development costs but also to promote uptake within their own companies.

The strategy will also indicate how funding should be put to use by setting priorities. For example, it may become clear that more money is needed for program development as the project progresses; and, as the Awareness Plan is implemented and evaluated, it may also become a focus for new and continued funding.

It will be up to the Long-term Planning and Funding Committees, and the Coalition itself, to decide whether the Coalition should become a permanent or longer-term body. If this is the case, core funding for a longer mandate will have to form part of the long-term funding strategy.

### *Year 3*

The planning and preparation of the first two years will begin to pay off in the third year as the major thrust of the Awareness Plan is launched. With programs in place and delivery mechanisms established, seniors will be urged to take literacy training programs, and those providing support for seniors will likewise be encouraged to take training in skills to better serve their older clients who have low literacy skills.

Research and program development will continue. The Coalition will assess the progress in these areas, evaluate the success of its own role and of the whole impact of the initiative, and plan future action. It will also implement the long-term funding strategy.

The Coalition will meet twice during the third year: once, to launch the major phase of the Awareness Plan, approve the long-term funding strategy and plan the evaluation; and later, to review the draft evaluation report and plan future action.

**Year 3 IMPLEMENTATION**

**1** *Launch second phase of Awareness Plan.* The purpose of this phase of the awareness is to reach those for whom the first two years of the Plan have prepared — learners. In keeping with the two thrusts of the Strategy, the learners are both seniors themselves, to raise their level of literacy, and those who support seniors in the community, to improve their ability to serve older people with low literacy skills. It should be mentioned that both target groups will contain subgroups defined by language, culture, geographic location, etc.

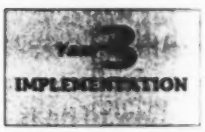
This phase of the Awareness Plan may require a staged approach. As described in Section 4 of the first year, the Awareness Plan is designed to inform, motivate and prompt action. To accomplish this will require a major attitude change on the part of many seniors. Shame and embarrassment about low literacy must be overcome, as must the mistaken belief that "old people can't learn". Seniors need to know that improved literacy will enhance their lives, that new programs will respond to their learning styles and interests. It will be no mean task for the Awareness Committee to design a plan which breaks down these and other barriers among seniors themselves, as a first step; builds peer and family support; and then promotes literacy training as an opportunity for self-empowerment and independence. The third message is to encourage action and show how to do it.

The other target group for this phase consists of the support providers. Included are home support and community agency workers, health care professionals, the retail sector (cashiers, sales people, receptionists, drivers, etc.), lawyers, bankers, the hospitality industry, etc. They will be urged to take training in how to recognize and be sensitive to their clients who have low literacy skills and how to serve those people better. As has been mentioned, it will be useful to have businesses onside already so that promotion can take place from within companies.

Innovative programs and "success stories" will be highlighted by an Awards program, perhaps sponsored by one or several of the Coalition partners, to help raise awareness of the issue and its potential for success.

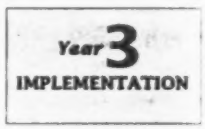
**One Voice** expects that this part of the Awareness Plan will not operate in isolation, but be coordinated with other strategies for the general population and/or specific groups.

Although scheduled to start in Year 3, this phase will need to continue for at least three years to have a reasonable impact. Accordingly, the long-term funding strategy should take into account the operation of the Awareness Plan for several years into the future.




2 *Continue research.* It is not possible to create the number and variety of new programs, new delivery mechanisms, etc. necessary to solve this problem in the space of three years. While the groundwork will have been laid, much more work will be required over the coming years. The Research Committee will include in its evaluation recommendations for further areas of research in program development and other domains.

The participation of the Research Committee in the evaluation process is detailed in item 4.




3 *Implement long-term funding strategy.* As the profile of the Coalition's activities reaches its height during this year, the opportunity to attract new funding will be at its best. The long-term funding strategy will have identified targets and methods; they will be put into action this year. The strategy will also delineate the priorities for spending whatever monies are raised, in order to maximize the immediate and long-term impetus of the Action Plan; as commitments are made during this year, preparations for new projects identified as priorities can begin.

As the three-year term of the Coalition draws to an end and the evaluation process nears completion, adjustments will be made to the long-term funding strategy to reflect the assessment. The Funding Committee will have to allocate responsibility for carrying on the fund-seeking should the Coalition be disbanded.

Year 3 IMPLEMENTATION

**4** *Evaluate results.* The process of evaluation, active since the beginning of the project, comes into full play during the third year. It will focus on the individual aspects of the Action Plan and also on the overall impact of the Strategy.

One area that will require attention this year is evaluation of the impact of literacy training on quality of life and independence for the individual and on cost-effectiveness for funders, governments and communities. Unfortunately, it will likely be too early for reliable data to be gathered; and yet the questions to be asked are critical to the ongoing support of the project. For example, can we confirm the proposition that improved literacy reduces health care spending? Is there a measurable reduction in the proportion of older Canadians who fall into the lower levels of literacy skills as defined by Statistics Canada? The Research Committee may recommend a new literacy skills survey be undertaken in the near future, and that studies focusing on cost-effectiveness and quality of life be planned for a later date when data can be expected to yield better results. Without such evaluation, the most compelling arguments for supporting the venture remain unsubstantiated.

Major initiatives of the Coalition, such as program development, program delivery and the Awareness Plan, can all be evaluated independently; and their combined effectiveness should also be examined. A reasonable period of time should be allowed for the Awareness Plan to take effect.

Year 3 IMPLEMENTATION

**5** *Evaluate Coalition.* As a model for management, promotion and coordination, the Coalition itself will undergo evaluation in the third year. Is it the right model? Should it be altered, and, if so, how? Should it continue? Have the Committees performed effectively? Is the secretariat adequate? The evaluation of the Coalition will take place early in the year to permit planning for the future in full knowledge of the assessment.

Year 3 IMPLEMENTATION

**6** *Plan future action.* After three years, the Coalition will possess broad experience to draw on for this planning process. It will be aware of the status of literacy among older Canadians and the programs available; it will enjoy strong links with the key stakeholders; and it will have an objective evaluation of its success. All will contribute to the formulation of a Long-term Plan for action.

The new plan, originally drafted in the first year of the Coalition's work, will be built around those who have the clearest potential to continue to act: seniors, providers, researchers, promoters and funders. It will be

consistent with the long-term funding strategy. The activities in the plan will be similar to those of the Start-up Plan, with a stronger emphasis on implementation. A long-term evaluation plan will be included.

Perhaps the most difficult decision will be whether to extend the term of the Coalition. Other options may have appeared by that time, such as another organization willing to take on the mandate, or the possibility of funding the secretariat for another length of time to carry on the responsibility.

### *5. Concluding remarks*

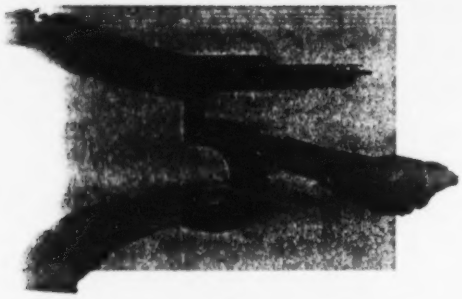
**One Voice** has presented the Three-year Start-up Plan in fairly concrete terms in this discussion. Some areas have been developed more than others, and many options have not been introduced at all.

Nevertheless, it must be remembered that the Coalition itself will be the principal architect of the venture. Its first tasks will be to review its own Terms of Reference and develop its Long-term Plan, an essential step in order to ensure that the Coalition assumes total ownership and responsibility.

Regardless of modifications the Coalition may make to the Plan, however, **One Voice** feels strongly that the principles of partnership and long-term planning which form the core of the process must not be altered without serious consideration. Likewise the two objectives of the Strategy — to raise literacy levels among older Canadians and to improve supports for older Canadians with low literacy — should continue to guide the Coalition in its actions.

The Task Force strongly recommended that implementation of the Strategy should take into account the need for participation and involvement of seniors, coordination with other initiatives, such as literacy programs provided by existing organizations, the formation of partnerships, and sensitivity to language and culture. We believe the Plan meets those requirements.

Finally, our emphasis on evaluation is deliberate. Without clear assessment of the impact of the Strategy, particularly in terms of cost effectiveness for governments and independence and quality of life for seniors, the arguments for continuing the initiative will be unsubstantiated.



# Conclusion

International Literacy Year was established by the United Nations to draw attention to the problems of illiteracy and to encourage countries the world over to think how they might move toward solutions. It was not meant to be a year of celebration, but a year of initiating action — a catalyst, a stimulant. It was the strong hope of Unesco, the lead organization for International Literacy Year, that 1990 would mark the beginning of widespread change in the literacy strategy of the citizens of the world.

Here in Canada, where we have always taken comfort and some pride in our high standard of living, the shock of learning that large percentages of our people have trouble coping with everyday literacy requirements has prompted many sectors to question some basic assumptions. Perhaps our education system is not as effective as we think it is if so many Canadians have low literacy skills. How many of us assume that the people we serve are literate — in business, health, governments, social services, etc.? How effective are communications strategies which do not take into account the demonstrated lack of literacy skills in certain population sectors?

The fact that such a high proportion (64%) of Canadians aged 55-69 are hampered in everyday life because of low literacy cries out for attention. Figures are meaningless beside the realities these people face. As our older population swells, we can anticipate that literally millions of Canadians will be at risk in our society. We must act now to prevent a crisis.

The Task Force that met in Medicine Hat felt that, as the major national seniors network, **One Voice** should take the initial lead in designing a *National Literacy Strategy for Older Canadians* and preparing the action program, recognizing the need for consultation with and involvement of partners. This we have done in the present document. The Strategy's guiding principles and action plan are entirely consistent with the 1987 Cedar Glen Declaration.

The goal of the Strategy is to achieve a society where low literacy levels are not a barrier to the full participation of older Canadians in our society. The goal is accomplished, in its most direct way, by improving

literacy levels among seniors and by improving the supports used by seniors so that they are more sensitive to people with low literacy levels and better able to serve them.

In a larger sense, though, the Strategy will promote a far greater awareness of literacy skills as they enhance our lives at all ages. By actively involving so many players at so many levels, this literacy initiative can foster intergenerational harmony, mutual respect and collaboration. We hope to see a revitalized commitment to providing good literacy skills at an early age and preventing low literacy in later years; a recognition of special needs in the population; better understanding of Canada's multicultural nature; sharing of our heritage and history; and healthier, more supportive communities in which to live and grow.

**One Voice** and the Task Force strongly urge individuals and organizations identified in this Strategy to review carefully the recommendations pertaining to them and reflect on what specific actions they might take over the coming months and years.

Through the dynamic partnership of the Coalition and the impetus provided by the Three-year Start-up Plan, our goals may well be achieved in the foreseeable future.

# Medicine Hat Task Force members

*(Participants in the francophone sub-group are identified by an asterisk.)*

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***Helen Appleton***
President of Retired Teachers Association, Medicine Hat, Alberta. Member of executive of Alberta Retired Teachers Association. Twenty-eight years teaching at various levels of education.

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***Wanda Cree***
Manager of Information Services, Seniors Advisory Council for Alberta, Edmonton. Masters Degree in Social Work. Ms. Cree has also worked for the Society for the Retired and Semi-Retired, Edmonton.

***Bert Curtis***
Retired after forty-two years in the education field. President of Confederation College for 15 years and Dean of Algonquin College, Ottawa for 7 years. Spearheaded the literacy initiative of the Association of Canadian Community Colleges.

***Kay Curtis***
Literacy coordinator at Community College, Woodstock, New Brunswick. English teacher, Laubach tutor and trainer, developing programs in academics at low levels.

***Hélène Dallaire****
Associate Professor, Faculty of Health Sciences, University of Ottawa. Dr. Dallaire has researched and written extensively in the fields of gerontology and literacy, with particular interest in women and francophones.

***Sylvie Deliencourt****
Project Officer for **One Voice**, the Canadian Seniors Network.

***Senator Joyce Fairbairn***
Appointed to the Senate of Canada in 1984. Previously a journalist; legislative assistant and communications coordinator to Prime Minister Trudeau. Senate committees include Foreign Affairs, Aboriginal Peoples, Terrorism, Youth. A passionate advocate for the cause of literacy in Canada.

***Paule Giguère****
Baccalaureat in Sociology, in Social Services, and Masters in Criminology. Analyst at Statistics Canada and now policy analyst at the Seniors Secretariat, Health and Welfare Canada.

***Larry Gray***
Director, Dominion Command Service Bureau, The Royal Canadian Legion. Graduate of Queen's University; served in the Royal Canadian Air Force including United Nations Military Truce Observer in the Sinai Desert. Since retirement has been a pensions advocate for disabled veterans and ex-servicemen.

***Ivan Hale****
National Secretary of **One Voice**, the Canadian Seniors Network.

***Dr. Earle Hawkesworth***
Teacher, clergyman, school administrator, retired Deputy Minister of Education for Alberta and Honorary Doctor of Education (Acadia). Life membership in Home and School Association, Alberta School Trustees Association, Alberta Interfaith Coalition on Aging. Board member and Chair of the Communications Committee of **One Voice**, the Canadian Seniors Network

***Professor Stan Jones***
Associate professor of Linguistics and Director of the Centre for the Study of Adult Literacy at Carleton University. Also Director of the Summer Institute for Literacy Practitioners. Consultant on test design and analysis for the National Literacy Survey conducted by Statistics Canada.

***Angela Keller-Herzog****
Canadian Organization for Development through Education (CODE). Ms. Keller-Herzog graduated in Economics and Political Science from McGill University and worked in the non-profit sector in development agencies; specific interests are literacy and community development.

***Christine Lawrence***
Executive Director, Alberta Council on Aging.

***Karen Lindstrom***
Project Officer for New Horizons and Seniors Independence Program, Health and Welfare Canada, Alberta region. Formerly Administrator of the Child Abuse Program in Manitoba; alcohol abuse counsellor and community health worker with elderly people in Winnipeg's inner city.

***Janet Longmate***
President, Movement For Canadian Literacy. Literacy practitioner since 1977 when she joined Grande Prairie Regional College, Grande Prairie, Alberta. Chair of the Adult Development Department, responsible for all programming related to literacy and English as a Second Language.

***Patti Martineau***
Assistant Director of Community Education, Medicine Hat College, Medicine Hat, Alberta. Responsible for training programs directed to seniors as well as youth in both urban and rural communities. Previously worked as a secondary school teacher, coordinator of continuing education and program director.

***Brad Munro****
Program Officer (Literacy), Canadian Commission for UNESCO. Formerly Director of federal/provincial/territorial relations, National Literacy Secretariat, Secretary of State

***Gordon W. E. Nore***
Teacher of English as a Second Language, Adult Basic Education, Business and Academic Writing at universities and colleges. Education Consultant to the Literacy and Health Project of the Ontario Public Health Association. Currently with the Learning in the Workplace Project, Frontier College, Toronto.

***Ted Norris***
Social Development Officer, Department of Secretary of State of Canada, Alberta region. Previously multi-cultural advisor with the city of Edmonton; has worked with ethno-cultural seniors groups. Special interests are ethno-cultural seniors, adjustment to Canadian Society and integration challenges, native seniors and the role of elders.

***Sister Gisèle Richard****
Retired teacher. Active in the Ottawa-Carleton Council on Aging. Board member of **One Voice**, the Canadian Seniors Network.

***Carol Robertson***
Executive Director, Manitoba Society of Seniors.

***Betty Rowberry***
Laubach Literacy of Canada. Holds a Diploma in Public Health Nursing, University of Toronto and was VON Public Health Nurse in Montreal before obtaining a Diploma in Early Childhood Education from McGill. Nursery school teacher for 15 years; coordinator of literacy volunteers.

***Yvon Samson****
Liaison officer with the Federation of Francophones outside Québec. Previously worked as a community development officer and Chief of Operations, Secretary of State of Canada.

***Serge Wagner****
Professor, Department of Education Sciences, University of Québec at Montréal. Engaged in literacy for more than 20 years; initiated several French literacy groups in Québec and Ontario. Has conducted research and published articles on literacy.

***Dick Weiler***
Policy Consultant for the Canadian Council on Social Development and the National Literacy Secretariat, Secretary of State of Canada.

***Jean Woodsworth***
President, **One Voice**, the Canadian Seniors Network. Retired social worker and long time advocate for seniors' rights and social justice. Holds the Order of Ontario.

***Bruce Fraser, Ed Sutherland, Alison Payne (Quay Words Ltd.)***
Facilitators

APPENDIX B

# Draft Terms of Reference
## for the Coalition and the Secretariat

### *Coalition*

- composition: about thirty individuals representing networks of key players in older adult literacy
- organization: a Chair, to be identified at the first meeting; an Executive Committee, to be struck at the end of the first year; Committees (Program Development and Delivery, Awareness, Research, Long-Term Planning, Funding, and additional ad hoc Committees as required); Secretariat
- meetings: twice each year; Committees to meet more frequently as required
- assume responsibility for implementing Action Plan
- form and maintain partnerships with key players; ensure representation
- inform and promote among partner networks
- secure commitments to action, funds and other resources
- secure resources for Coalition itself and projects
- approve project design; monitor project activity; receive project reports
- design specific actions through Committees; expertise from Coalition members and networks
- monitor other literacy activity and promote coordination where possible
- evaluate and report regularly on activities and progress to partners, funders and others
- recommend further action

### *Secretariat*

- provide administrative support for the Coalition and Committees: arrange meetings, prepare documentation, record proceedings, distribute minutes; correspondence; manage financial affairs and keep accounts; maintain office and staff as required
- assist in implementation of activities of Plan; identify opportunities for innovation, development, links
- identify funding sources; prepare funding proposals in collaboration with Committees; monitor project activity; receive and distribute project reports; ensure financial accountability of projects
- maintain resource centre; monitor research results; establish links with NALD and other resources; provide information as requested
- promote partnerships; identify key players

# Outline of elements for an Awareness Plan

The following list suggests some target audiences for the Awareness Plan, messages that might be conveyed, and methods of conveying the information.

## General Public

***Messages*** many seniors have literacy problems; not their fault — why; it's a serious problem and deserves our attention; something can be done — what; here's how you can help

***Methods*** PSAs (radio, TV, print); brochures; in-depth stories

## Seniors

***Messages*** many seniors have literacy problems; not their fault — why; it's a serious problem and deserves our attention; something can be done — what; here's how you can help; don't be ashamed — do something; help your low-literate friends; become a volunteer tutor; how to link with literacy sector; advocate for literacy and compensation

***Methods*** PSAs (radio, TV, print); brochures; in-depth stories; seniors centres, Legion halls; **One Voice** network; special groups

## Literacy Sector

***Messages*** to pay attention to the issue. Research: define areas for further study; share existing work and work in progress; evaluation techniques for programs and results; link with gerontology researchers. Program: need to adapt and design special programs for seniors — how — content, style, location, involve learners; need to broaden mandate to include compensation/support as part of literacy; alternative forms of literacy; use seniors as tutors

***Methods*** information sharing system; research working groups, network; link with CAG; involve MCL, CAL, NVOs and networks; "how to" booklet or video

## Education Sector
***(administrators, government, teachers)***

***Messages*** role to play in older adult literacy; partnerships with literacy organizations; importance of lifelong learning; deinstitutionalization of program delivery; broaden concept of evaluation; seniors can deliver programs

***Methods*** form links; conference

### *Service Sector*
***(banks, retail, health/community care, hospitality, etc.)***

***Messages*** aware of dimensions of issue; how it affects industry/service; how to serve low-literate seniors — recognize, treat, promote/refer to literacy training; alternative means of literacy; part of solution; protect/advocate

***Methods*** form links; conference with key players; professional journals; associations, labour

### *Voluntary Sector*

***Messages*** include seniors in literacy initiatives; identify seniors as targets in communications strategies, adapt information; seniors can contribute; links among groups can strengthen

***Methods*** form links; communicate through networks

### *Media*

***Messages*** literacy central to communications; dimensions of problem; make literacy a priority; media have important role to play in public awareness, promotion of literacy training, supports, innovation; understand alternative literacy; adapt information presentation; develop, provide literacy training through media

***Methods*** form links; conference; how-to and commitment

### *Governments*
***(federal, provincial, regional, municipal)***

***Messages*** dimensions of issue; government-wide solutions; adapt communications, policies; long-term cost effectiveness of seniors literacy; responsibility to support, promote; sharing and coordinating role; consultations with other players

***Methods*** consultation; links; provide information and research; how-to training; advocate, encourage

### *Private Sector*
***(business, industry; housing, auto, manufacturers, tourism, etc.)***

***Messages*** design to be sensitive; promote literacy among workers and retirees; fund programs, organizations; serve consumers

***Methods*** links; how-to training; work from top down

# Task force issues report and recommendations

Many members of the Task Force are involved with the practicalities of designing and delivering literacy programs. And many are sensitive to the needs of people with low literacy skills in dealing with everyday life. The following points and questions were raised and discussed during the development of the *National Literacy Strategy for Older Canadians* by the Medicine Hat Task Force.

The Task Force also developed some recommendations for action which might be undertaken as the Plan is implemented. These are ideas which need further development. They are presented here as a resource for discussion and consideration by the Coalition and by others who may wish to explore these issues further.

## Questions

### *Literacy Programs*

How should we involve seniors in design and delivery of programs?

How do we locate and motivate isolated seniors to participate in programs? How do we ensure that opportunities are accessible and match needs?

How do we ensure flexibility of venue to make involve seniors outside of traditional program delivery settings?

What should be included in the design of appropriate programs, training materials and documents for seniors? How do we ensure that training recognizes cultural context?

What is the effectiveness of peers as tutors? How can programs and training systems make use of intergenerational tutors and counsellors?

What is the appropriate role of volunteers? What should be the appropriate means of recruitment and reward for people working as tutors or counsellors?

How do we address the duplication of effort among those providing literacy programs?

How do we ensure the maximum participation of institutions and colleges? What is the appropriate role and function of traditional education services in literacy training?

How do we increase the commitment of the educational sector to lifelong learning?

What is the relative importance of basic entry literacy vs. functional literacy?

### *Compensation and Support Systems*

How can we reduce the complexity of agency communications with seniors? How do we increase awareness among professionals in compensating for illiteracy (health and social services, education, government programs, and the private sector)?

How do we make support systems an integral part of functional literacy? How do we encourage the development of responsive community networks made up of all those who live and work with seniors?

What is the role of seniors in providing support to people with low literacy skills?

***General Issues***

How do we balance the question of the right to be literate and the responsibility to be literate?

What role do situational factors play in literacy needs and abilities: cultural, linguistic, technological, geographical, societal values?

How do we move from project funding to secure resources for long range programs?

What further research is required? How do we best transfer research findings to applications?

## *Recommendations for specific action*

The Task Force developed recommendations for action stemming directly from their discussions and from the **One Voice** Conference Report, ***Learning — That's Life!*** In the subsequent drafting of the Strategy, many of these ideas were incorporated into the Three-year Start-up Plan. The recommendations are listed here to present an accurate record of the Task Force's discussions and as a resource for further discussion.

1 AWARENESS

*To raise the general awareness of society of the existence of low literacy among older Canadians, related problems and solutions.*

***Targets:*** seniors and seniors organizations; literacy community; educational sector; governments (all levels); researchers; media; corporate sector; voluntary sector; social policy groups; special interest groups such as organized labour, women's groups, native associations, churches, service clubs, professional associations, educational institutions, health services specialists and community groups, etc.; society as a whole.

***Messages:*** dimensions of the problem; causes; implications, present and future; opportunities for solutions; what role can be played in solutions; desired outcomes.

***Methods:*** seniors' press; mainstream media, especially non-print; speakers; special interest communications networks; targeted campaigns (brochures, mailings, etc.).

***Goals:*** increased awareness and understanding of the problem; removal of social stigma and development of positive attitude; motivation for action; desire to participate.

2 RESEARCH

*To sensitize researchers in the fields of gerontology and literacy to each other's work and findings; to encourage cross-fertilization of ideas and produce new insights.*

***Targets:*** researchers in the fields of gerontology, education, literacy, health, social issues, etc.; research funding bodies

***Methods:*** identify areas requiring fundamental research; ensure research is appropriate and applicable to practice; coordinate so that good research is not repeated unnecessarily; expand the field of evaluation research.

***Goals:*** new understanding of the problem from different perspectives; data on which to base policy and justify investment of funds in programs; opportunities for innovation; assessment of programs which work best; evaluation of effectiveness of Strategy.

3 ADVOCACY

*To actively promote the goals and objectives of this Strategy to the appropriate players and urge them to act on specific strategies.*

- Encourage the federal government to develop a long-term policy to support literacy interests. Maintain direct contact with the federal government's National Literacy Secretariat and support the continuance of its mandate and funding.
- Recognizing that it is the right of every Canadian to be literate, encourage both federal and provincial governments to ensure that both short-term and long-term funding is available for seniors literacy programs from both literacy and seniors program resources. This funding would be earmarked for both compensation programs and literacy training programs.
- Urge other government agencies involved in other ways with seniors or literacy programs (e.g., health, citizenship, justice) to take a partnership approach for promoting and funding literacy initiatives for seniors.
- Enlist the support of the national and provincial Advisory Councils on Aging
- Approach the private sector to encourage involvement in literacy initiatives and financial support for literacy training and compensation programs. Contact service clubs, corporations and foundations who have expressed an interest in seniors, social issues or literacy.
- Promote cooperation and collaboration between governments, the private sector and the voluntary sector.
- Work towards a national co-ordination of effort to ensure success.
- Direct specific lobbies to political caucuses, government departments and agencies of federal provincial and municipal governments.
- Establish endowment funds to support literacy and compensation programs.

4 EVALUATION

*To assess the impact of the components of the* National Literacy Strategy for Older Canadians.

- Develop a master plan for evaluating the Strategy and its components.
- Establish key indicators of success for the Strategy.
- Gather baseline data for comparison purposes.
- Gather data on components; perform evaluations and analysis.
- Identify successes, plateaux, failures; develop recommendations for changes to Strategy.
- Report results of assessment to key players.
- Revise Strategy as necessary and continue implementation.

### *Specific Strategies to Improve Literacy Levels among Seniors.*

***Goal:*** To improve policy, research, design, delivery and results of literacy programs for older Canadians.

#### *Policy*

- Promote the development of public policy to increase opportunities for older Canadians to improve their literacy levels.
- Encourage provincial governments to develop policies to affirm a commitment to lifelong education, including literacy training.
- Conduct policy and/or program evaluations using available standard models.

#### *Research*

- Promote research into the design of literacy training programs for seniors. Encourage innovation; expand the evaluation component; disseminate results.
- Conduct a nation wide community needs assessment to identify high-risk groups of seniors and to determine what services, resources, methods and materials are required to improve their literacy levels.
- Identify special needs groups within the seniors population (francophones, natives, learning disabled people, etc.) and encourage research into ways of improving their literacy skills.
- Determine factors affecting the maintenance and loss of literacy skills and develop appropriate responses.

#### *Programs*

- Examine and evaluate existing literacy programs, materials and resources as to their appropriateness for the older learner. Involve seniors in this process.
- Adapt existing programs to meet the unique needs of older learners.
- Create new, innovative demonstration programs for older learners.
- Ensure that numeracy skills are taught in addition to literacy skills.
- In order to ensure that sensitivity to linguistic and cultural diversity is respected it is recommended that programming priority be given to mother tongue literacy; that the right to literacy be granted in the official/native language of choice; that in literacy programming for minority language groups, different age classes be integrated with allowance given to the needs of older learners. Seniors from these groups should be involved in program development.
- Organize an exchange of training methods and materials between minority language literacy trainers.
- Develop a Compendium of Good Practices for literacy trainers

*Delivery*

- Information and referral services should be encouraged to direct people to literacy programming and minority language training.
- Social agencies should be sensitive to literacy levels among their users and direct them to literacy training opportunities as appropriate.
- Provide programs for seniors in non-traditional (i.e. classroom) settings; e.g., seniors' centre, home, Legion hall, church, etc.
- Promotional materials for literacy programs should work to minimize the sense of social stigma and create a positive attitude. Taking literacy training should become a popular thing for seniors to do.
- Encourage people to maintain or upgrade their literacy skills throughout the lifespan, especially in light of new technology.
- Special care should be directed to identifying and reaching the hard-to-reach senior.
- Seniors should be told what benefits they will get out of taking literacy training, such as ability to read to grandchildren, ability to manage a budget, opportunities to learn about new subjects, etc.
- Encourage educational institutions to provide support for literacy programs for older learners.
- Local agencies should put older adult literacy high on their lists. Volunteer centres can encourage volunteers to become tutors; churches can develop a program for their neighbourhood or congregation; libraries can acquire special collections for older new readers...
- Urge businesses to provide or promote literacy training for retired or retiring employees.

### *Specific Strategies to Improve Supports for Seniors with Low Literacy Levels.*

***Goal:*** To improve the awareness and sensitivity of those providing services to seniors to the problems of low literacy and the actions they can take to provide better, more supportive service.

- Identify high-risk areas for seniors with low literacy skills, such as home safety, hazardous products, money management, medication use, susceptibility to con artists, etc. and develop programs to compensate.
- Encourage government departments to examine their service agencies and identify opportunities for improving service to low-literate people.
- Identify other services seniors use and develop ways of improving service to people with low literacy skills.

- Develop a campaign to sensitize retailers, banks, drivers, service staff, etc. to the needs of seniors with low literacy and develop instruction programs on how to serve these customers better.
- Develop instructional materials for groups of professionals working with seniors on how to deal effectively with people who have low literacy. Groups would include physicians, nurses and other health care providers, social service workers, pharmacists, lawyers, police, financial planners, governments, etc.
- Ensure that non-print information services are available, such as telephone community information and referral services, and that these agencies are sensitive and provide appropriate services to people with low literacy. Such agencies might also offer letter-reading and writing, form-filling, personal advocacy, etc.
- Encourage the use of plain writing in any written communications with seniors.
- Improve awareness and sensitivity to the impact of layout and organization on the comprehension of written material, including the use of type styles and sizes, colour, contrast, etc.
- Promote the use of non-print methods of conveying information.
- Provide information on how to create and use literacy support networks. Promote mutual support as a method of building and maintaining such networks.

APPENDIX E

# *One Voice publications on older adult literacy*

The following titles are available from the National Office of **One Voice**, the Canadian Seniors Network.

Illiteracy and Older Canadians: An Unrecognized Problem. Literature Review (English)

Illiteracy and Older Canadians: An Unrecognized Problem. Summary Report (English)

L'analphabétisme chez les Canadiens âgés : un problème méconnu. Rapport sommaire (French)

Learning — That's Life! Conference Report and Recommendations (English)

Apprendre c'est la vie! Rapport et recommandations de la conférence (French)

L'analphabétisme chez les francophones âgés du Canada : un défi à relever (French)

L'analphabétisme chez les francophones âgés du Canada : un défi à relever. Rapport sommaire (French)

Illiteracy and Older Francophones in Canada: A Challenge. Summary Report (English)

A National Literacy Strategy for Older Canadians (English)

La stratégie nationale d'alphabétisation pour les Canadiens âgés (French)